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ABSTRACT

This curriculum guide is for a distributive education offering designed as a semester unit of instruction at the middle or junior high school level, providing the student with an opportunity to explore in greater depth the varied career opportunities available in wholesaling through "hands-on activity" projects. The Teacher's Guide Section is composed of eight units. The first seven cover the content of the course; the eighth, "Special Activities," contains materials which may be used throughout the course. Each of the seven units for the teacher is separated into three areas: Unit Overview, Evaluation Keys, and Learning Activities. Each unit overview includes: A competency statement, performance objectives, concepts developed, suggested equipment, recommended materials, consumable supplies needed, and special resources. Evaluation keys reflect the answers to evaluation instruments found in the Student Materials Sections. The Learning Activities area in each of the first seven teacher units contains group and individual learning activities for each performance objective, as well as special media applicable to each objective and its set of learning activities. The Student Materials Section is composed of three areas: student handouts (which cover a major portion of the student section), evaluation instruments, and special resources. (Author/TA)

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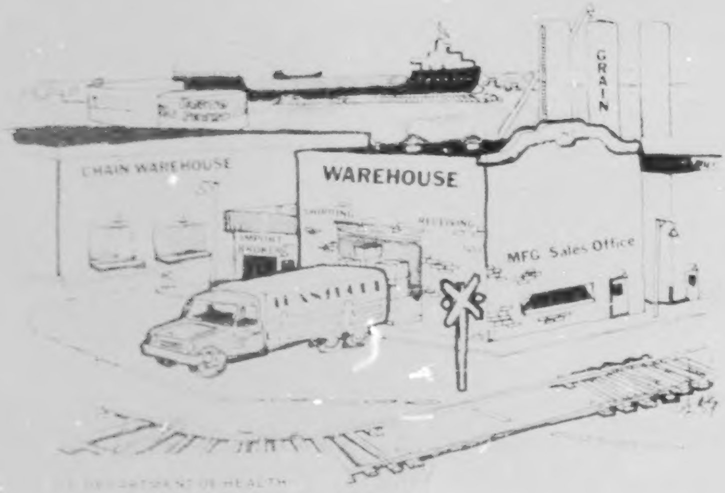
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Joe D. Mills

EXPLORATION OF WHOLESALING CAREERS

Florida Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Vocational, Technical, and Adult Education Division

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This public document was promulgated at an annual cost of $12,068.36 or $4.02 per copy to provide suggested performance objectives, learning activities, and evaluation instruments to Distributive Education teachers for their use in Distributive Education offerings at the middle and/or junior high school level.

FOREWORD

Exploration of Wholesaling Careers is a Distributive Education offering which is designed as a semester unit of instruction at the middle or junior high school level. It represents the second phase of a comprehensive career vocational program.

This course is one of the elective courses in Distributive Education designed as a follow-up to "Orientation to Marketing Careers." It provides the student with an opportunity to explore in greater depth the career and job opportunities available in wholesaling.

In this offering, the student is made aware of the broad field of marketing activities and the careers available to him within the various wholesaling businesses. He has an opportunity to experience the tasks performed by wholesalers through "hands-on activity" projects.

This curriculum guide is divided into two main sections: The Teacher's Guide Section and the Student Materials Section.

The Teacher's Guide Section is composed of eight units. The first seven units cover the content of the course. The eighth unit called SPECIAL ACTIVITIES contains materials which may be used throughout the course.

Each of the seven units for the teacher is separated into three areas:

UNIT OVERVIEW

EVALUATION KEYS

LEARNING ACTIVITIES

Each unit overview includes: a competency statement, performance objectives, concepts developed, suggested equipment, recommended materials, consumable supplies needed, and special resources.

The evaluation keys which follow the unit overview reflect the answers to the Score and Survey Evaluation Instruments found in the Student Materials Section.

The Learning Activities area of each unit contains group and individual learning activities for each performance objective, as well as special media applicable to each objective and its set of learning activities.

The student materials section is composed of three areas in the following order:

STUDENT HANDOUTS

EVALUATION INSTRUMENTS

SPECIAL RESOURCES

At the completion of this *Exploration of Wholesaling Careers* offering, it is anticipated that the student will:

- demonstrate an awareness of the major marketing activities and the vast number of opportunities available to him within the field of wholesaling.
- relate the importance of marketing in the economy and the value of the tasks performed within the wholesaling occupations.
- reflect an understanding of the role wholesalers play in the distribution of goods from the producer to the consumer or business user.
- identify initial career goals and values.
- exhibit a better understanding of his self-identity and the role he may assume in society.

ACKNOWLEDGEMENTS

Our gratitude is extended to the following teachers for their efforts in developing a draft copy of this guide during a summer workshop held at the University of South Florida: Robert Boegli, Eleanor Burger, Scott Cosby, Douglas Johnson, and Patricia Ketteringham.

Sincere appreciation is expressed to all Distributive Education teachers who field tested the draft copies for two years and who provided assistance and constructive suggestions in the final development.

Special recognition is extended to the following pre-vocational Distributive Education teachers who revised the design, format, and content of the guide at a summer workshop at the University of South Florida:

JUDY DAVIS, CHAIRMAN

GARY [illegible] JESSIE COWSER

BRUCE BAPTIST JIM WILKERSON

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The final revision of this "Exploration of Wholesaling Careers" curriculum guide was written and edited by MISS BARBARA J. WILKIE, Curriculum and Instruction Specialist, under a special grant through the University of South Florida.

acknowlegements

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INTRODUCTION

This *Exploration of Wholesaling Careers* guide has been developed around the five major working areas found in most wholesaling businesses. These include: buying, selling, warehousing, transportation, and finance. Each of these areas has been handled in a separate unit.

The coordinating element of management, which is a level of performance found within each of the wholesaling areas, has been covered in the final unit of the guide, "Working for a Wholesaler." The first unit is intended to give the student an overall view and understanding of the channels of distribution and the major marketing functions which occur throughout the channels in all kinds of businesses and industries, including wholesale establishments. In addition, the first unit, "The World of Wholesaling," describes six main kinds of wholesalers and relates how the eight major marketing functions occur within the five major career areas.

Teacher's Guide Section

Within each Unit Overview of the Teacher's Guide Section, you will find the following components in this designated order:

1. *Competency* – an overall statement of what the student is expected to attain.
2. *Performance Objectives* – specific steps which the student should accomplish in the sequential order that he should perform them. For example, the first objective will indicate the beginning or knowledge level at which he should demonstrate proficiency before continuing to a higher level indicated by the second objective.
3. *Concepts* – an overview of the major ideas or content that is suggested for that unit. These have been identified in the order which would most likely be used to efficiently cover the learning unit.
4. *Equipment* – suggested audio-visual equipment or furniture to be used with the learning activities of that unit.
5. *Materials* – recommended audio-visual and printed resources which are congruent with the unit and which have been reviewed by distributive educators to ascertain their value for the given unit.
6. *Supplies* – consumable items which are basic to the effective development of the suggested learning activities in the unit.
7. *Special Resources* – other recommended resources which would be helpful, if available or possible, including commercial games, field trips, and speakers. Special Student Handouts contained within the guide are also identified here by numbers.

Following each unit overview are the Evaluation Keys which contain answers for both the pretest (Scene) and post-test (Survey) evaluation instruments in the unit.

The Learning Activities suggested include group and individual learning experiences and projects presented in the order in which they should be used according to the objectives. The group and individual activities especially designed for the beginning level of learning stated in the first objective are placed at the beginning of the activities area. Group and individual activities corresponding to the next level of learning indicated by the second objective would follow, and so on.

Special Media includes recommended audio-visual materials, printed resources, and commercial games which would enhance student interest and understanding. These are materials reviewed and/or used by Pre-Vocational Distributive Education teachers.

The Special Activities unit provides guidelines and forms which may help the teacher develop and implement special events or activities for greater effectiveness in teaching students in the middle grades. These may be used throughout the course.

Student Materials Section

The student materials section of the *Exploration of Wholesaling Careers* guide includes three divisions: student handouts, evaluation instruments, and special resources.

1. *Student Handouts* — information sheets, special activities, student projects numbered in the order suggested in the learning activities area of the teacher's guide section and which are designed for easy duplication.

2. *Evaluation Instruments* — measurement items to ascertain the student's competencies before he begins a unit and evaluate his performance following the completion of the learning activities. Each pretest and post test evaluation instrument of a unit contains a test item designed to evaluate the level of learning specified by each performance objective.

   The evaluation instruments have been given names other than pretests or post-tests to assist the teacher in creating a positive atmosphere for measurement of the student's entry and progress. The pretest instruments are called Scenes. Depending upon the unit, it may be entitled "The Buying Scene," "The Warehousing Scene," or "The Management Scene."

   The post test evaluation instrument is called the Survey. Like the scenes, each unit has an evaluation instrument identified by a clue term and the word "survey." Some examples of these include: "The Buying Survey," "The Selling Survey," and "The Management Survey."

   Each pretest Scene or post test Survey has exactly the same number of test items as there are objectives for the particular unit. If the unit has two objectives, then the Scene and Survey for the unit will each have two test items. The test items are numbered to correspond with the order of the stated objectives and the learning activities. Thus, the first item on both the Scene and Survey evaluation instruments will assess the student's performance according to the first objective of that unit. Likewise, the second test item will correspond to the second objective and the third test item would match the third objective of that unit.

3. *Special Resources* — audio-visual materials, resource publications, commercial games, and organizations which may be helpful in teaching *Exploration of Wholesaling Careers*. All of these have not been suggested within the teacher's guide section. Some resources are included that may be appropriate but have not been reviewed to ascertain their relativity to this offering. It should be noted that there are many other materials which have been specifically omitted because they are not appropriate for this learning level or they are not [illegible] for the marketing information content for wholesaling.

   The Audio-Visual Materials include 16mm films, filmstrips, slides, tapes, records, and transparencies. Films are identified as in color or black and white. Filmstrips are classified according to sound and color. If a filmstrip is in color, the word color will follow the filmstrip title. Otherwise, it is in black and white. If the word sound does not follow the filmstrip title, the filmstrip is silent. Tapes are identified as reel or cassette. All slides are in color.

   All of the Audio-Visual Materials are arranged in alphabetical order according to the material's title. Pertinent information about the material follows, as well as the resource name. If the title includes a series of materials, such as tapes or slides, specific individual titles are printed on succeeding pages under the resource's name. All audio-visual resources' names and addresses follow the materials listing for each reference.

The *resource publications* include pamphlets, booklets, career briefs, comic books, books, and reference volumes. The title of a publication is listed in alphabetical order, followed by its publisher. If the publication is a series of units or briefs, a detailed list of specific titles follows the alphabetical listing. Those publications with detailed listings have been identified with an asterisk* after the resource's name.

The specific listings will be found on a succeeding page under the resource's name. Those alphabetical listings with the asterisks which have detailed listings on succeeding pages have the resource's address printed on that page rather than within the general alphabetical list.

Certain *commercial games* have been reviewed and used by teachers with their Pre-Vocational Distributive Education students. Some of these have been recommended under Some Resources for each unit overview. A comprehensive list of these has been included directly after the Resource publications list.

In addition, some *Resource organizations and agencies* including professional, business and educational organizations have been identified with names and addresses to assist in the location of additional new materials. These have been listed in alphabetical order for easy reference.

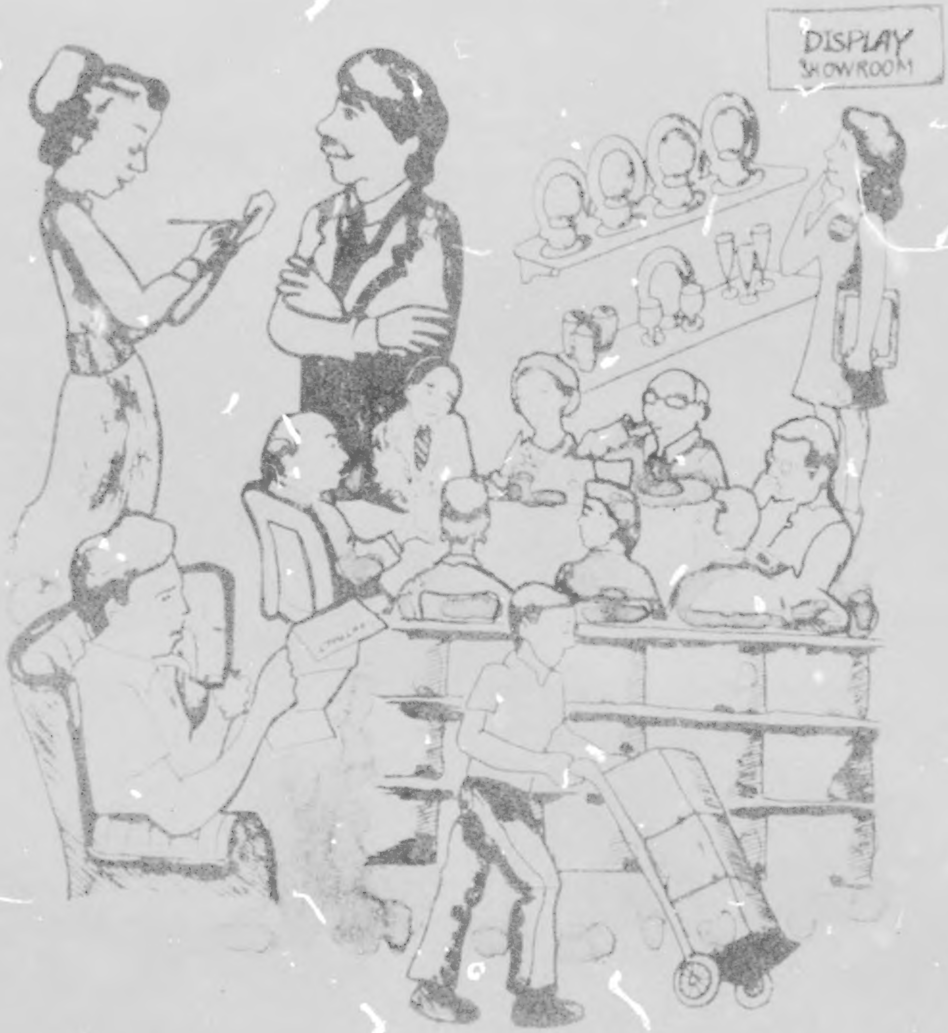
It is not expected that every teacher will use all of the suggested learning activities and materials contained in this guide. Some course offerings are scheduled for twelve weeks, others continue for a semester. Class periods extend for different lengths of time. Teachers will develop activities and materials to better meet the needs of his/her students.

It is hoped that this curriculum guide will provide direction and assistance to the teacher. In addition, the teacher is encouraged to cover at least part of each unit, so that each student will develop an awareness of all phases of wholesaling. Major concepts, sets of learning activities, as well as pretest and post-test items for each objective have been incorporated into each unit to assist in this task.

A teacher may decide to cover only a portion of a unit. In this case, he would work with the student on the information and materials corresponding to the first objective of that unit since this is the beginning for knowledge level. The first objective, its learning activities, and its test items must be covered before a student progresses to the second objective and its materials. Likewise, objectives one and two must be satisfied before a student attempts the learning activities and evaluation items corresponding to objective three.

One or more of the learning activities for an objective may be used. The group activities are specifically designed for a number of students. The individual activities, however, may be used with an entire class of students, working independently or with one individual student on his own. Thus, a teacher might select one group and one individual activity to use with a class of students.

TEACHERS GUIDE SECTION


DISPLAY
SHOWROOM

the world of wholesaling

THE WORLD OF WHOLESALING

(Unit Overview)

Competency

Understanding of the major marketing activities involved in all types of wholesaling businesses and the role of the wholesalers in the distribution of goods from the producer to the consumer or user.

Objectives

1. Without assistance, the student will identify the major components in the channels of distribution and arrange them in the correct order to show the most frequently used channel with 80% accuracy. (knowledge)

2. Given fifteen descriptions of marketing terms, including the eight major marketing activities, the student will supply the appropriate term for each description with 80% accuracy. (knowledge)

3. Given ten examples of wholesaling businesses and six types of wholesaling businesses, the student will match each type of wholesale business to its example with 80% accuracy. (comprehension)

4. Given ten wholesaling situations, the student will indicate which major marketing activities are involved in each case with 80% accuracy. (comprehension)

Concepts

1. All goods must first be produced. A *producer* may be an extractor (farming, fishing, mining), a converter (oil, iron, sugar), or a manufacturer (cars, appliances, furniture).

2. A *consumer* is one who purchases goods and services for his use, not for resale to others. A consumer may be an individual, organization, business, or industry.

3. Since it is not usually practical for an individual consumer to purchase products directly from its producer, he generally purchases his goods from a retailer or wholesaler.

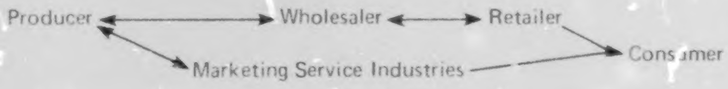
4. A *retailer* is a business which sells goods anywhere to the individual consumer. Retailers may buy their goods to resell directly from the producer, from a wholesaler, or from a special agent or assembler.

5. *Wholesalers* act as middlemen in goods between producers and businesses who purchase goods for resale or for business use. The wholesaler serves retail and wholesale merchants who resell merchandise, as well as industrial, institutional, and commercial users who use the goods for business operation.

6. Sometimes an *agent* or *assembler* represents several producers in getting products from the producers to the wholesalers and retailers.

7. *Marketing Service Industries* buy from and sell to all kinds of businesses, as well as to consumers. These businesses (such as transportation and insurance) sell services that are needed or desired by consumers and businesses.

8. The various ways in which products are distributed from the producers to the consumers are known as the *channels of distribution.* The most frequently used channel is:



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Goods flow from the producer to the wholesaler, the wholesaler to the retailer, and the retailer to the consumer. Marketing services are involved throughout the distribution process.

9. *Marketing* includes all the activities involved in acquiring and distributing goods and services for production, processing, business use, or personal consumption.

10. *Distribution* includes all the marketing activities which occur in the merchandising and supplying of goods and services.

11. Eight major marketing activities or functions are involved in the marketing of all goods and services by all businesses:

    marketing research — involves the gathering of information so that marketing managers can make sound decisions and solve marketing problems.

    standardization and grading — involves setting values or limits for the goods and services, as well as the inspection and labeling to check conformity.

    buying — supplies a business with the necessary materials needed for its use or resale to another business or consumers.

    selling — the process of assisting or persuading a customer to make a wise buying decision through personal contact or sales promotion materials.

    transportation — provides the service of physically moving property and people from one location to another.

    storage — provides the time and space necessary to house merchandise until it is needed for industrial purposes or distribution to consumers.

    risks — are possibilities of financial loss to people or property by unforeseen or uncontrollable factors.

    finance — deals with funds necessary for business operations and customer purchases.

12. *Management* serves as the coordinator of all marketing activities and personnel within a business.

13. Many marketing career opportunities are available within the six major types of wholesale businesses:

    Merchant Wholesalers — buy goods from producers, take title to the goods, break bulk, warehouse, sell, extend credit, and deliver goods to businesses for resale or for business use. Exmaples of these wholesalers include:

    a. *Wholesale Merchant* — sells, delivers, provides many services, extends credit; carries a variety of related products from many manufacturers (hardware, drugs, toys).

    b. *Wholesale Distributor* — represents one or more manufacturers for the storage, sale, and delivery of the goods within a certain region of the country (automobiles, appliances and heavy equipment).

    c. *Rack Merchandiser* — sells and delivers goods to retailers; services the rack of merchandise in the store by refilling, removing, pricing, and arranging items; keeps title to goods until they are sold (fast moving items such as housewares, novelties, beauty aids, and candy).

    d. *Cash and Carry* — sells merchandise to businesses at the wholesaler's warehouse; does not deliver goods or extend credit (hardware, novelties, housewares, beauty aids).

    e. *Truck Distributor* — combines selling and delivery of goods at one time along certain routes at given intervals of time (dairy products, bakery goods, produce, snack foods).

Producer's Sales Outlets – special business locations set up by a manufacturer or other producer to promote and sell its merchandise.

a. *Sales Branch* – stores and sells goods; provides merchandise showroom and services (electrical parts and equipment, business machines and supplies).

b. *Sales Office* – sells to and services accounts in a certain territory; has goods shipped from the place of production or merchant wholesaler's warehouse (farm equipment, machinery, appliances).

Petroleum Bulk Plants and Terminals – stores and sells petroleum products to service stations, commercial oil distributors, and business users; may handle related products.

a. *Plant* – receives supply by truck or rail; stores and sells liquid to retailers, commercial distributors, or business users (gasoline, fuel oil, kerosene).

b. *Terminal* – receives supply by tanker, barge, or pipeline; stores and sells petroleum product to retailers or business users (gasoline, kerosene, fuel oil).

c. *Gas Facility* – distributes liquified petroleum gas by bulk or bottle to retailers, wholesalers, or business users.

Agents and Brokers – do not own goods, but assist in buying, storing, and selling of merchandise.

a. *Manufacturer's Agent* – acts as an independent salesman for a manufacturer's goods; may sell more than one company's goods if they are not competing lines (furniture, home furnishings, clothing).

b. *Brokers* – represent many buyers and sellers and do not own or handle the goods (textiles, coffee, sugar).

c. *Commission Agent* – stores and sells goods for the seller but does not own them; collects money for goods sold, deducts his expenses, and sends balance to producer (fruits, vegetables, poultry).

d. *Selling Agent* – assumes sales department function of a producer by contracting for its entire output during a certain period of time, but does not own goods.

e. *Purchasing Agent* – buys merchandise for businesses acting as their buying staff, does not own goods, usually does not handle goods; known as a resident buyer when buying dry goods such as apparel.

f. *Auction Companies* – independent businesses which provide a place for different buyers to bid on merchandise which is displayed and described (tobacco, bananas, used automobiles, grains).

Product Assemblers – buys farm products in small amounts; grades and combines goods into large quantities; and stores, resells, and delivers the product.

a. *Independent Dealer* – privately-owned business which buys and assembles goods and resells quickly for profit.

b. *Cooperative Association* – group of local producers who collectively bargain for better prices, reduce selling costs, and obtain better grading.

c. *Commission Buyer* — acts as a buying agent on a commission basis for businesses, such as packing houses, canneries, or central market cotton merchants.

d. *Grain Elevators* — privately-owned business that operates on its own or acts for a producer; buys, grades, cleans, mixes, stores, sells, and ships grain.

Chain Warehouses — branch headquarters for a large service chain of retail stores; buys, inspects, sorts, stores, and delivers merchandise to member stores or service establishments.

Equipment

1. Overhead projector, projection screen, chalkboard.
2. Filmstrip projector, 16 mm film projector, slide projector.
3. Cassette tape recorder, record player.

Materials

1. Films: "Marketing as a Career"
   "Tell It Like It Is"
2. Filmstrips: "Discovery"
   "Job Opportunities Now"
3. Slides: "The World of Marketing and Distribution"
   "Understanding Wholesaling"
4. *Career Opportunities: Marketing, Business, and Office Specialists*
5. *Career Briefs,* Careers Publications
6. *Careers and Opportunities in Retailing*
7. *Channels of Distribution*
8. *Discovery: Career Log,* Scholastic
9. *Encyclopedia of Careers and Vocational Guidance*
10. *The Marketing Story*
11. *Occupations and Careers*
12. *Popeye and Careers Comic Books*
13. *Working For a Wholesaler*
14. *Your Job in Distribution*

Supplies

1. Posterboard, Construction Paper, White Paper
2. Glue, tape, scissors, rulers, felt tip pens.
3. Magazines, newspapers, journals, telephone directories

Resources

1. Student Handouts #1-11
2. Commercial game: Auctioneer

THE WHOLESALE SCENE – KEY

1. Answers must be in the following order:

   1. Producer
   2. Wholesaler
   3. Retailer
   4. Marketing Service Industries
   5. Consumer

If the student accurately identified 4 of the 5 components in the above question, he will have displayed sufficient knowledge for objective #1.

2. The following marketing terms should be given:

   1. Wholesaler
   2. Producer
   3. Retailer
   4. Consumer
   5. Research
   6. Buying
   7. Marketing
   8. Risk
   9. Storage
   10. Finance
   11. Selling
   12. Service
   13. Management
   14. Transportation
   15. Standardization

A score of twelve correct answers for 80% accuracy on this test item by the student will show satisfactory accomplishment for objective #2.

3. The businesses should be identified as follows:

   1. A
   2. D
   3. C
   4. D
   5. E
   6. F
   7. A
   8. B
   9. E
   10. A

When the student attains 8 correct answers or 80% proficiency, he will have indicated the necessary understanding for objective #3.

4. The wholesale situations involved the following marketing activities:

   1. Marketing Research
   2. Standardization
   3. Buying
   4. Selling
   5. Transportation
   6. Storage
   7. Risk
   8. Finance
   9. Selling
   10. Management

After successfully completing 8 of the 10 situations above for 80% accuracy, the student will have demonstrated acceptable performance for objective #4.

THE WHOLESALE SURVEY – KEY

1. Answers must be in the following order:

   1. Producer
   2. Wholesaler
   3. Retailer
   4. Marketing Service Industries
   5. Consumer

A score of 4 or 80% accuracy on this test item will satisfy objective #1.

2. The following marketing terms should be given:

   1. Wholesaler
   2. Producer
   3. Retailer
   4. Consumer
   5. Research
   6. Buying
   7. Marketing
   8. Risk
   9. Storage
   10. Finance
   11. Selling
   12. Service
   13. Management
   14. Transportation
   15. Standardization

If the student achieves a score of 12 correct answers or 80% accuracy, he will have demonstrated adequate proficiency on objective #2.

3. The businesses should be identified as follows:

   1. C
   2. E
   3. F
   4. C
   5. B
   6. B
   7. A
   8. D
   9. D
   10. C

Eight (8) correct answers or 80% accuracy on this evaluation item by the student will show satisfactory understanding of objective #3.

4. The wholesale situations involved the following marketing activities:

   1. Marketing Research
   2. Standardization
   3. Buying
   4. Selling
   5. Transportation
   6. Storage
   7. Risk
   8. Finance
   9. Selling
   10. Management

If the student answers 8 situations correctly for 80% accuracy on this measurement item, he will have exhibited acceptable performance for objective #4.

LEARNING ACTIVITIES

UNIT TITLE *The World of Wholesaling* UNIT *1* OBJECTIVE *1*

Group

1. Review with the students the major components in the channels of distribution: PRODUCER – WHOLESALER – RETAILER – MARKETING SERVICE INDUSTRIES – CONSUMER. Divide the class into five groups and give each of them one of the five components at three levels of difficulty, so that they have five easier questions, five of moderate difficulty, and five of greater difficulty. Review all of the questions from the five groups, editing and arranging all of them in three categories. Study the rules of the Student Handout #1: "CHANNEL CHALLENGE" and review them with the students. Play the game activity as directed and reemphasize the most frequently used channel of distribution and its components at the end of the game.

2. Write the following words on the chalkboard or overhead projector: Producer, Wholesaler, Retailer, Marketing Service Industry. Above each of the words, place a (+) to the left and a (–) to the right as shown below.

+ –	+ –	+ –	+ –
Producer	Wholesaler	Retailer	Marketing Service Industry

Select two students to come up to the front of the room. Have one student stand to the left of the board or projector to represent the (+) and the other student stand to the right to represent the (–). Ask the class how many of them would like to work for a producer and write that number above the plus sign over the word producer. Ask the class how many of them would not like to work for a producer, and place that total above the minus sign over the word producer. Ask the class how many of them did not vote and if they know why they did not vote. Ask some students who voted yes (+) why they voted that way. Ask some of the students who indicated no (–) why they would not want to work for a producer. Discuss what is meant by a producer including reference to the agricultural businesses, mining operations, and manufacturers.

Follow the same procedure for each of the other three types of institutions: wholesalers, retailers, and marketing services. Select different students to represent the (+) and (–) poles and use the following terms on the board, overhead, or signs held by the students:

PRODUCER	*WHOLESALER*	*RETAILER*	*MARKETING SERVICES*
Perfect (+)	Winner (+)	Right On (+)	Super (+)
Pooh (–)	Waste (–)	Ripoff (–)	Stinker (–)

Emphasize the role and importance of each of the components in the channels of distribution and review the order of the flow of goods in the most frequently used distribution channel.

Individual

1. Give the student a copy of Student Handout #1: "Channels of Distribution – How We Get Our Goods." Explain to the student that the illustration shows the major components involved in the channel of distribution which is most frequently used. Discuss the meaning of each of the terms: producer, wholesaler, retailer, marketing service industry, and consumer.

Ask the student to collect pictures illustrating each of the components. Have him prepare a poster showing the most frequently used channel of distribution, using the collected pictures around the correct terms in the channel.

2. Review the major components found in the most frequently used channel of distribution. Give the student construction or poster paper, glue, scissors, ruler, string, coat hangers, and magic markers. Ask the student to build a mobile showing the five major components in the order in which they are involved within the most frequently used channel of distribution. Explain to the student that he may use different shapes and sizes, such as circles, squares, arrows, etc. Hang the mobile from the ceiling in the classroom.

3. Distribute a copy of Student Handout #2: "Components in the Channels of Distribution" to the student. Have him read the information and fill in the blanks on the page at the end of the material. When he has completed the questions, discuss the answers with him, reviewing the order of the components in the most frequently used channel.

Special Media

1. Films: "Marketing as a Career"
   "Tell It Like It Is"
2. Filmstrips: "Discovery"
   "Job Opportunities Now"
3. Slides: "The World of Marketing and Distribution"
   "Understanding Wholesaling"
4. *Career Opportunities: Marketing, Business, and Office Specialists*
5. *Career Briefs,* Careers Publications
6. *Careers and Opportunities in Retailing*
7. *Channels of Distribution*
8. *Discovery: Career Log,* Scholastic
9. *Encyclopedia of Careers and Vocational Guidance*
10. *Your Job in Distribution,* pages 18-26

LEARNING ACTIVITIES

UNIT TITLE *The World of Wholesaling* UNIT # *1* *OBJECTIVE # 2*

Group

1. Place the following list of marketing terms on the chalkboard or the overhead projector:

   Producer
   Wholesaler
   Retailer
   Consumer
   Marketing Services
   Marketing
   Buying
   Marketing Research
   Standardization
   Marketing Risk
   Selling
   Storage
   Transportation
   Market Finance
   Marketing Management

   Explain to the students that you are going to give a clue for a marketing mystery term. State each of the following descriptions and add the phrase, "What am I?" Have the students guess the term. Discuss each term with the student and place a check next to it on the board after it has been correctly identified.

   I act as a middleman in distributing goods from the producer to the retailer or marketing service industry.

   I develop the original product as a farmer, manufacturer, etc.

   I sell merchandise directly to the individual consumer.

   I purchase goods for my personal use, not for resale to others.

   I gather information to assist in management decision-making.

   I supply a business with the necessary materials, machinery, merchandise, etc., needed for its use or resale.

   I am all the activities involved in acquiring and distributing goods and services for processing, business use, or personal consumption.

   I am the possibility of financial loss to persons or property by unforeseen or uncontrollable factors.

   I provide the time and space necessary to house merchandise until it is needed for industrial use or distribution.

   I deal with the funds necessary for a business' operation or a consumer's purchase.

   I assist or persuade a customer to make a wise buying decision.

   I buy goods from all kinds of businesses and sell services to businesses and consumers.

   I serve as a coordinator of all marketing activities.

   I physically move people and property from one location to another.

   I set the values or limits for goods and services, as well as label and inspect them for [illegible]ormity to the values.

2. Explain the directions to the game activity in Student Handout #3: "Marketing Match," or give each student a copy of the rules. Review each of the marketing activities, emphasizing the meaning of each.

Individual

1. Distribute a copy of the Student Handout #4: "Making It In Marketing" to the student. Have him read the material and answer the questions at the end of each section. When he has completed the assignment, review his answers on the sheets. Emphasize the eight major marketing functions and that they take place in all kinds of businesses.

2. Give the student a copy of the Student Handout #5: "Marketing Crossword Puzzle" and have him complete it as directed. When he has completed the puzzle, check the answers with him explaining each term. Review the components in the channels of distribution and the order in which they are usually found. Explain the eight marketing functions and management giving examples of them in use.

Special Media

1. *The Marketing Story*
2. *Occupations and Careers*
3. *Popeye and Careers Comic Books*
4. *Working For a Wholesaler*
5. *Your Job in Distribution*

LEARNING ACTIVITIES

UNIT TITLE *The World of Wholesaling* UNIT # *1* OBJECTIVE # *3*

Group

1. Make a transparency of Student Handout #6: "Wholesale Distributors" and make copies of it for each of the students if possible. Write the following types of wholesalers on the chalkboard:

   MERCHANT WHOLESALERS PRODUCERS OUTLETS

   AGENTS AND BROKERS PETROLEUM BULK STORAGE

   PRODUCT ASSEMBLERS CHAIN WAREHOUSES

   Ask students to guess which type of wholesaler is depicted by each of the illustrations. As each one is guessed, emphasize the distinguishing characteristics of that type of wholesale business and ask students to give other examples of it. Relate names of those found in your local or nearby communities when possible.

   Some types of wholesale businesses are not illustrated in the handout, such as itinerant vendor. Explain what each of these means and have students give examples of each of them. Select some examples of wholesale businesses, and let students guess which type of wholesaler they are.

2. Distribute a copy of the Student Handout #7: "Wholesale Mixup" to each of the students. Allow them time to unscramble the letters and reveal the types of wholesale-distributors. When the students have completed the puzzle, ask different students what they think each of the terms mean or give an example of that type of business. Emphasize the meaning of each type of business.

   Assign each student one type of wholesale businesses. Provide them with copies of journals, telephone directories, and magazines. Give each student the rest of the class period to see how many names each can find for that type of business. When possible have the students cut out illustrations they find. Give each student a sheet of construction paper. Have them identify their type of wholesaler at the top. Have them arrange the names and illustrations of the businesses on the paper. Display all of them around the room and let the class circulate around the room looking at them.

Individual

1. Give the learner a copy of Student Handout #8: "The World of Wholesaling." Let the student study each of the types of wholesalers in the handout. Ask him to use the local telephone directory to find three examples of each type of business that is mentioned in the handout. For those which he may have difficulty finding in the directory, ask him to think about one he knows. Examples for many will be found under the kinds of merchandise carried, such as hardware, building supplies, and jewelry. Others, such as grain elevators and auction companies, will be listed under the special type of wholesaler.

   Review each of his examples with him and add to the list of examples that he has compiled. Refer to some local wholesalers and their locations in the community.

2. Distribute a copy of the Student Handout #9: "The Wholesaler's Maze" to the student. Have him complete the maze as directed and write the examples of each type of wholesalers in the blanks provided.

When the student has completed both the maze and the list of examples, review the path of the maze with him explaining the distinguishing characteristics of each type and example of wholesale business. Check his examples listed, making any necessary corrections. See if the student can supply one or two local wholesalers for each type of wholesaler and see if the student can identify the type of wholesaler for reinforcement purposes.

Special Media

1. *Working For a Wholesaler*

LEARNING ACTIVITIES

UNIT TITLE *The World of Wholesaling* UNIT # *1* OBJECTIVE # *4*

Group

1. Explain the directions for the game activity in Student Handout 10: "Wholesale Windup." Give each student a copy, if possible. As stated in the handout, have each student submit nine questions – one for each of the marketing activities. Inform the students that the questions should pertain to activities within a wholesaler, rather than definitions for the marketing activities.

2. Develop descriptions of nine wholesaling activities around the nine marketing activities. Construct the activities around a central idea, such as a certain product or line of merchandise.

   Write the nine marketing activities, including the eight major functions and management, on the chalkboard as shown below. Ask each of the students to write them on a piece of paper. Ask each student to rank each of the marketing terms according to its importance to a wholesaler from his point of view. Explain that a "1" would be placed in front of the marketing activity which he felt was most important, and a "9" would be written in the blank for the marketing activity which he considered the least important in a retail business.

   ___ MARKETING RESEARCH

   ___ BUYING

   ___ STANDARDIZATION

   ___ SELLING

   ___ STORAGE

   ___ TRANSPORTATION

   ___ FINANCE

   ___ MARKETING RISK

   ___ MANAGEMENT

   Read each of the related nine wholesale activities you have developed. Have the students turn their papers over before you read them. Ask the students to rate the nine activities that you read. When they have completed rating the nine activities, have the students compare their rankings with the first set. Were they the same? If some of them were different, why did they rank them differently?

   Review the major marketing activities as they relate to the wholesale businesses. Show how some functions are emphasized or are more evident in some wholesalers as compared to others. For example, the chain warehouse puts greater emphasis on transportation because of shipments sent to all its member stores or service establishments.

Individual

1. Provide the student with magazines that can be cut up, as well as old wholesale trade journals, such as *National Wholesalers.* Have the student prepare a poster showing the marketing activities in action with wholesale business. Explain to the student that he is to find an illustration or sketch a scene in which each marketing activity takes place in a wholesale setting.

Tell the student to place a caption under each illustration or drawing to show the marketing activity which is depicted. Remind the student that the selling function may be demonstrated by a personal selling situation or sales promotion activity. If he wishes he may show both of them. Display the poster in the room.

2. Give the student a copy of the Student Handout # 11: "Marketing Activities in Wholesaling" and have him complete each of the given descriptions by identifying the marketing activity that is involved. When he is finished, discuss each of the wholesale situations with him clarifying any marketing activities about which he is not clear.

Special Media

1. *Working For a Wholesaler*

DISPLAY
SHOWROOM
BUYER

buying for a wholesaler

BUYING FOR A WHOLESALER

(Unit Overview)

Competency

Ability to relate the buying occupations at each career level to the varied buying activities which occur within all types of wholesale businesses.

Objectives

1. Given the three major levels of career classifications, the student will name three wholesale buying positions for each of the career levels. (knowledge)

2. Given ten wholesale buying activities, the student will indicate the wholesaling buying career described in the activities with 80% accuracy. (comprehension)

3. Given the description of a wholesale buying situation, the student will predict which buying careers, decisions, and resources would be employed to effectively handle the situation with 75% accuracy. (application)

Concepts

1. Buying is the marketing function which supplies the wholesale business with merchandise for resale to other businesses for their resale or business use. Buying activities occur in all types and sizes of wholesale establishments.

2. The wholesale buying staff or department generally performs three of the eight major marketing functions: marketing research and standardization activities, as well as those of buying.

   a. Marketing research activities involve the gathering of information concerning customer preferences, business trends, and general economic conditions in order to make wise buying decisions.

   b. Standardization activities include the implementation and enforcement of the standards set by the management for the business' image and the type of merchandise it should carry. In some instances, the buyer or merchandise manager is responsible for actually developing standards for the merchandise sold by the business. The buying staff may be charged with inspecting and testing merchandise before it is actually purchased.

3. All buying careers may be classified into one of the following levels:

   a. *Entry Level* – beginning job with little skills or experience required.

   b. *Career Level* – position with developed skills and experience.

   c. *Management/Specialist Level* – highly skilled and experienced careers including supervisory and executive personnel.

4. Some of the wholesale buying career opportunities available according to their career levels are:

MANAGEMENT/SPECIALIST CAREER LEVEL

Resident Buyer	buys apparel, dry goods, general merchandise for wholesalers from his office located at a central market.
Merchandise Manager	determines all merchandising policies, coordinates all merchandising activities, including buying, personal selling, and sales promotion, for wholesale business.
Head Buyer	orders merchandise for a wholesaler to resell.
Specialty Buyer	orders one type of merchandise carried by the business such as sporting goods or lawnmowers.
Broker	buys goods or services as an agent for wholesalers in a certain area, such as coffee or sugar.
Marketing Research Analyst	studies and interprets information gathered, makes recommendations about market conditions and business trends.
Purchasing Manager	supervises all buying activities and personnel for the business.

ADVANCED CAREER LEVEL

Assistant Buyer	assists the head buyer in determining what merchandise to order; communicates closely with the sales personnel.
Buyer Trainee	assists the buyers and assistant buyers by providing information concerning stock turnover, oversees rotation of stock, and often serves as a salesman or order dispatcher.
Marketing Research Trainee	assists the marketing research analyst in reviewing and interpreting survey data from consumers.
Merchandise Distributor	buys goods from a producer and handles sales, service, and promotion from a central warehouse to retail chain stores for a certain region of the country.
Salesman	highly skilled in helping his customer choose the products, brands and promotional aids needed for business use or resale.
Purchasing Agent	writes and processes orders for staple goods carried by the wholesaler.

JOB ENTRY CAREER LEVEL

Comparison Shopper	investigates merchandise and promotional policies of a competitor's business or showroom.
Product Tester/Sampler	examines the product in performance or uses one of the senses (taste, smell, etc.) to determine the quality of a product.
Counterman	assists the customer in selecting goods, handles the sale and bagging; may become a buyer trainee.

Marketing Research Surveyor	conducts a marketing research survey of consumers by telephone to determine interests or likes.
Marketing Research Interviewer	conducts a survey in person of consumers to discover their preferences.

5. Some large wholesale firms have many personnel to handle the different buying activities. In smaller establishments, a single person (many times the manager as well) may perform all of the necessary buying activities. Thus, depending upon the type of business, the personnel may only be involved in part of the buying decisions.

6. Buying for the wholesale business involves four major buying decisions:

   a. *What to buy* – selection, quality, suitability of goods

   b. *How much to buy* – large quantities, small-lots, stock balance

   c. *When to buy* – best time for purchase and receipt of merchandise

   d. *Where to buy* – suppliers, buying offices, central markets, trade shows

7. The buying plan is the summary of decisions made concerning the purchase of merchandise for a business. It is based upon information that is assembled and analyzed by the buyer and/or purchasing manager. It includes what, how much, when, and where to buy merchandise. Buying plans in smaller businesses are usually prepared by management personnel in that firm. In large organizations with branch offices, the buying plan and most of the buying activities are handled at a central office.

8. In many wholesale businesses, much of the buying for the local warehouses entails reordering of basic stock items. This may be performed by supplier's salesmen or a warehouse manager. The basic stock items are generally determined by the central office buying staff.

9. Various resources are used by the buying staff to develop a buying plan and ultimately purchase goods to satisfy customers' needs and wants:

   a. Sales records
   b. Customer want slips
   c. Trade publications
   d. Company sales personnel
   e. Comparison shopping studies
   f. Marketing research surveys
   g. Buyer's resource file
   h. Supplier's sales force
   i. Business/economic trends
   j. Advisory consumer panels
   k. Current media information
   l. Product test or sampling results
   m. Trade services
   n. Market Agency
   o. Central Market

Equipment

1. Overhead Projector, 16 mm film projector, filmstrip projector
2. Slide projector, cassette tape recorder, record player

Materials

1. Films: "Fashion – The Career of Challenge"
2. Filmstrips: "Careers in Buying"
   "Careers in Fashion and Textiles"
3. Cassette Tapes: "Career Development Series – The Buyer"
4. Pamphlets: *Merchandise Management Trainee*
   Your Career in Purchasing Management
5. *Career Opportunities: Marketing, Business and Office Specialists*
6. *Dictionary of Occupational Titles,* Volume I
7. *Encyclopedia of Careers and Vocational Guidance,* Volume I
8. *Handbook of Job Facts,* Science Research Associates
9. *Occupations and Careers,* Webster/McGraw-Hill
10. *Occupational Briefs,* Science Research Associates
11. *Occupational Guidance Booklets,* Finney Company
12. *Occupational Outlook Handbook,* U.S. Department of Labor
13. *Widening Occupational Roles Work Briefs,* Science Research Associates

Supplies

1. Cassette or reel tapes, video tape
2. Construction paper, posterboard, white paper

Special Resources

1. Student Handouts #12-29
2. Commercial Game: "Dealer's Choice"
3. Guest Speaker

THE WHOLESALE BUYING SCENE – KEY

1. Any three careers for each of the career levels are acceptable:

Job Entry	*Advanced Career*	*Management/Specialist*
Inventory Control Clerk	Purchasing Agent	Purchasing Manager
Product Tester	Buyer Trainee	Resident Buyer
Salesclerk	Marketing Research Trainee	Merchandise Manager
Telephone Surveyor	Merchandise Distributor	Head Buyer
Personal Interviewer	Counterman	Specialty Buyer
Sampler		Broker
		Marketing Research Analyst

A total score of 9 correct answers, 3 for each career level, is satisfactory performance for objective #1.

2. The following ten buying careers should have been listed:

a. Resident Buyer
b. Department Head
c. Merchandise Distributor
d. Specialty Buyer
e. Marketing Research Analyst
f. Personal Interviewer
g. Head Buyer
h. Product Tester
i. Comparison Shopper
j. Merchandise Manager

If the student lists 8 careers correctly for 80% accuracy, he will have successfully completed objective #2.

3. The following careers, decisions, and resources should have been identified:

CAREERS	*DECISIONS*	*RESOURCES*
Merchandise Manager	What to Buy	Sales Records
Head Buyer	How Much to Buy	Buyer's Resource File
Specialty Buyer		Trade Publications
Assistant Buyer		Customer Want Slips
Buyer Trainee		Suppliers Salesmen
		Current Media Information
		Research Survey Results
		Business/Economic Trends
		Company Salespeople

The student will achieve objective #3 when he provides 12 correct answers for 75% accuracy on this test item.

THE WHOLESALE BUYING SURVEY – KEY

1. Any three careers for each of the career levels are acceptable:

Job Entry
Inventory Control Clerk
Product Tester
Salesclerk
Telephone Surveyor
Personal Interviewer
Sampler

Advanced Career
Purchasing Agent
Buyer Trainee
Marketing Research Trainee
Merchandise Distributor
Counterman

Management/Specialist
Purchasing Manager
Resident Buyer
Merchandise Manager
Head Buyer
Specialty Buyer
Broker
Marketing Research Analyst

A total score of 9 correct answers, 3 for each career level, is satisfactory performance for objective #1.

2. The following buying careers should have been identified:

a. Merchandise Manager
b. Comparison Shopper
c. Head Buyer
d. Telephone Surveyor
e. Resident Buyer
f. Purchasing Manager
g. Assistant Buyer
h. Marketing Research Analyst
i. Specialty Buyer
j. Sampler

The student will complete the criteria for objective #2 if he names 8 of the careers correctly for 80% accuracy.

3. The following careers, decisions, and resources are acceptable:

CAREERS
Purchasing Manager
Merchandise Manager
Head Buyer
Specialty Buyer
Assistant Buyer

DECISIONS
What to Buy
How Much to Buy
When to Buy
Where to Buy

RESOURCES
Central Market
Sales Records
Buyer's Resource File
Trade Publications
Customer Want Slips
Suppliers Salesmen
Current Media Information
Research Surveyor Results
Business/Economic Trends
Company Salespeople
Trade Services

The student will achieve objective #3 when he provides 15 correct answers for 75% accuracy on this test item.

LEARNING ACTIVITIES

UNIT TITLE *Buying for a Wholesaler* UNIT # *2* OBJECTIVE # *1*

Group

1. Give each student a copy of Student Handout #12: "Buyer's Bingo." Duplicate copies of both sheets, so that each student will have a gameboard. Have each student select the careers he wants in each column or prepare the set beforehand.

   As an introductory activity, call out the career titles and have the students place the markers over the career title under the appropriate column. If the students have already covered the career titles and job descriptions in Student Handout #14: "Buying for a Wholesaler," you may want to read the job description. The student must then know the career title in order to place a marker on his card.

   When the students have completed the game activity playing several games, discuss the various career titles with them. Ask students to develop five different career ladders in buying to show the different ways in which a person may progress from the job entry to management/specialist levels. More than one career may be included for each level since people usually are employed at more than one job in each level, especially the job entry and advanced careers.

2. Provide each student a copy of the Student Handout #13: "Buyer's Quest." Make a transparency of the handout. Allow the students about ten minutes to find the careers. Show the transparency and have students alternate giving the location of the various career titles in the word search puzzle.

   As the career titles are circled on the transparency, emphasize the career level of each and briefly cover the job function of each of them. Ask students what kinds of wholesale businesses would employ the different buying personnel.

3. Direct each student to get out a sheet of paper or prepare one for them, so that each student has a form similar to the one below: (number 1-20)

CAREER CHOICES	I WILL	I MIGHT	I WON'T
1.			

   Take slips with buying career titles and descriptions, and give them to various students in the class. Ask students to read off the job descriptions one at a time and conclude with: "Who Am I?" After students guess, give the correct title and review the description. Ask each pupil to write the career choice on his paper, and mark the column that best expresses how he feels personally about being on that job.

Individual

1. Distribute the Student Handout #14: "Buying for a Wholesaler" to the student. Ask him to read the information and answer the review questions at the end of it. When he is finished, review the three career levels and examples of each. Discuss the four major buying decisions and the marketing functions performed by the buying personnel and/or department.

   For reinforcement purposes, identify each of the career levels and ask the student to give you four examples of each. Review the different career ladders which may be taken in buying from the job entry to the management/specialist levels.

2. Give the learner a copy of the Student Handout #15: "Buyer's Mindbender." Explain to the student that he must place four management/specialist buying careers in the left two columns, four advanced careers in the middle two columns, and four job entry careers in the right two columns.

   Remind him that there should be two careers in each row across, down, and diagonally if he finds the correct solution. When he is finished, review the solution with him. Ask him to identify at least two other buying careers for each of the career levels.

Special Media

1. Films: "Fashion – The Career of Challenge"
2. Filmstrips: "Careers in Buying,"
   "Careers in Fashion and Textiles"
3. Cassette Tapes: "Career Development Series – The Buyer"
4. Pamphlets: *Merchandise Management Trainee*
   Your Career in Purchasing Management
5. *Career Opportunities: Marketing, Business and Office Specialists*
6. *Dictionary of Occupational Titles*, Volume I
7. *Encyclopedia of Careers and Vocational Guidance*, Volume I

LEARNING ACTIVITIES

UNIT TITLE *Buying for a Wholesaler* UNIT # *2* OBJECTIVE # *2*

Group

1. Divide the class into groups of four or five students. Give each student two slips of paper approximately "4" x "5". If possible, use construction or colored mimeograph paper. Write each of the buying career titles on the overhead projector or chalkboard.

   Ask each student to write one of the career titles on one of the slips of paper and turn it over so that no one can see it. Then ask each student to write one word on the other side of the paper which could describe that buying job. Explain to the students that they may not use any word found in the career title.

   Have one student in each group serve as a timer, alternating the role within the group. Have one member of each group begin by having the other group members guess his career title in one minute. Group members may ask any question which can be answered with a yes or no. The only catch is that once a member asks, "Is it the ________ career?" he must have guessed the right career or he is eliminated from the game. Students alternate asking questions, one at a time in a clockwise manner.

   Students in the group take turns having their career guessed. When all the members have finished the first career, repeat the procedure for the second slip of paper. After all careers have been guessed, discuss each of the careers and ask students to reveal the descriptive words they chose for the career. Have them explain why they selected the word. Review each of the buying careers and the activities which each performs.

2. Divide the class into two teams. Select a team captain for each group. Write each of the buying career titles on two slips of paper and place them in two boxes. Have each team captain select a box. Flip a coin to see which goes first. Have each team captain appoint the order in which team members will roleplay. The captain of the team winning the toss begins the game.

   He selects a slip of paper from the box and has one minute to study it. At the end of the minute he must give one clue word to his team members. They have ten seconds to guess the career. If they do not guess the career title, he gives another word and they have ten more seconds to guess the career title. The team has five chances with five clue words. If they do not guess the career, the other team has a chance to guess the word. The other team of course has an advantage of having heard the other clue words.

   A timer should be appointed to keep track of the number of seconds each team accumulates. The team which has the lowest number of seconds to guess the career titles wins the game.

Individual

1. Give the student a copy of Student Handout #16: "Who's Who in Wholesale Buying." Ask him to read the information and complete the exercise at the end of handout. When he is finished, discuss the careers included. Review some of the others which are found in other departments or are found less frequently in businesses.

2. Provide the student with a copy of the Student Handout #17: "Buyer's Trail Puzzle" and have him complete it as directed. When he has completed the puzzle, discuss the various careers with him. Review any others which have been omitted. Emphasize that buying careers are found in all types of wholesale businesses.

Special Media

1. *Career Opportunities: Marketing, Business, and Office Specialists*
2. *Dictionary of Occupational Titles,* Volume I
3. *Encyclopedia of Careers and Vocational Guidance,* Volume I
4. *Handbook of Job Facts,* Science Research Associates
5. *Occupations and Careers,* Webster/McGraw-Hill
6. *Occupational Briefs,* Science Research Associates
7. *Occupational Guidance Booklets,* Finney Company
8. *Occupational Outlook Handbook,* U.S. Department of Labor
9. *Widening Occupational Roles Work Briefs,* Science Research Associates

LEARNING ACTIVITIES

UNIT TITLE *Buying for a Wholesaler* UNIT # 2 OBJECTIVE # 3

Group

1. Divide the class into six groups and designate each of them as the personnel for one of the following types of wholesalers:

   MERCHANT WHOLESALER
   BROKERS AND AGENTS
   PRODUCER'S SALES OUTLETS
   PRODUCT ASSEMBLER
   CHAIN WAREHOUSE
   PETROLEUM BULK STORAGE

   Supply each group examples of the various buying resources including the following student handouts:

Student Handout # 19	Comparison Shopping Survey
Student Handout # 20	Customer Want Slip
Student Handout # 21	Buying Resource File Card
Student Handout # 22	Sales Record

   Have each group study and discuss the different resources which could be used by their business to determine what to buy. Allow each of the groups fifteen minutes to decide which resources are most likely to be used by that business. Have each group report to the rest of the class their conclusions. Discuss each business with the groups and explain why certain resources are used more frequently by the different wholesalers.

   Review the four major buying decisions with the class and describe the activities and personnel involved in each situation.

2. Provide each student with copies of the following student handouts, one at a time. Have each student complete them one at a time. Review each of the buying exercises with the group before proceeding to the next handout. Distribute each of the following handouts:

Student Handout # 23	Studying the Sales Report
Student Handout # 24	Analysis of Want Slips
Student Handout # 25	Completing a Purchase Order

   When the students have completed all of the forms, discuss how each of them is involved in the buying process. Ask the students what aids or resources buyers can use to determine what to buy. Ask them if different businesses use some and not others. Discuss the various resources used by the different types of wholesalers.

   Emphasize the four major buying decisions that a buyer must make and the importance of each. Give students examples of the buying decisions in various types of wholesalers.

Individual

1. Give the student a copy of the Student Handout #18: "Buying Resources for Wholesalers." When he has read the information, discuss the various resources that may be used explaining the purpose of each and the types of wholesalers who are likely to use them. Show the student samples of some of them, including those in Student Handouts #19 - #22.

   When he has finished reviewing the examples, ask him what four major buying decisions must be made by every business. Illustrate the importance of each by giving examples of wholesale situations with different types of wholesalers involved.

2. Provide the student with copies of Student Handouts #26: "Dealer Want Slip – Camper Cold Storage" and #27: "Dealer Research Survey – Camper Cold Storage." Have the student read the handouts and complete them as directed. When he has finished the projects, discuss his results with him. Review the four major buying decisions and the various buying resources which may be used by different wholesalers.

3. Distribute Student Handout #28: "Purchasing the Goods" to your learner and have him complete the assignment. When he has finished, ask the student to explain what buying decisions must be made and resources consulted before the purchase order can be made.

4. Give the student a copy of Student Handout #29: "Who Wants the Real Thing?" Have him study the Sales Report and Stock Record and answer the questions for each. Discuss his answers with him when he completes them.

Special Media

1. *Handbook of Job Facts,* Science Research Associates
2. *Occupations and Careers,* Webster/McGraw-Hill
3. *Occupational Briefs,* Science Research Associates
4. *Occupational Guidance Booklets,* Finney Company
5. *Occupational Outlook Handbook,* U.S. Department of Labor
6. *Widening Occupational Roles Work Briefs,* Science Research Associates

selling for a wholesaler

SELLING FOR A WHOLESALER

(Unit Overview)

Competency

Ability to relate the various selling careers, methods, and services in the selling process to the different types of wholesalers.

Objectives

1. Given the three major levels of career development, the student will name four wholesale selling careers for each area with 75% accuracy. (knowledge)

2. Given ten steps in the wholesale selling process, the student will arrange them in the sequential order that they would occur with 80% accuracy. (comprehension)

3. Given a product to be promoted, sold, and serviced for a wholesaler, the student will select eight appropriate sales personnel, four promotional methods, and four customer services for the business with 75% accuracy. (application)

Concepts

1. Selling is an essential link between the wholesaler of goods and the business user or consumer. Selling is the process of assisting or persuading a customer to make a wise buying decision to meet his needs or wants for a good or service.

2. Personal selling involves a direct face-to-face or telephone contact with a customer during the sales process.

3. Customer services are extra services provided by the wholesaler to its customer to support the sale of merchandise. Customer services are utilized to help establish the business' reputation, create goodwill with its customers, encourage patronage of the business, as well as promote the sale of specific products.

4. Customer services involve personnel in all areas of the wholesale business and are classified into five main categories:

   Customer Credit Services – allow the customers to purchase merchandise in exchange for a promise to pay for them later.

   Merchandise Handling Services – sales-supporting activities involved in the order or follow-up of a sale for goods.

   Customer Accommodations Services – sales-supporting activities which help customers get the maximum satisfaction from the goods they buy.

   Information/Advisory Services – assistance provided to customers about the selection, promotion, and use of merchandise.

   Customer Shopping Conveniences – special services offered to increase goodwill and patronage of the wholesaler.

5. Sales promotion supplements personal selling of products by the use of special methods to inform and persuade prospective customers to buy a particular product from a wholesaler.

6. Sales promotion includes four major areas: advertising, display, special promotional techniques, and public relations/publicity.

   a. *Advertising* is any paid form of non-personal presentation of ideas, goods, or services by printed or audio-visual means for an identified sponsor. Advertising methods or media used include radio, television, newspapers, direct mail, billboards, and handbills.

   b. *Display* is any means of visually showing merchandise, often as they would be used, within or around a business to attract customers' attention and create interest in buying the displayed goods. Methods of display include window, counter, floor, wall, ledge, ceiling, island, and point-of-purchase displays.

   c. *Special promotional techniques* are used during a sales promotion campaign to create extra attention or interest in the product and/or business. Often planned and prepared by advertising personnel, the special promotional methods or techniques used include contests, samples, demonstrations, sweepstakes, and exhibits.

   d. *Public relations and publicity* are any means used to develop a favorable public image of a business or create goodwill. Some of the methods or activities include news releases, sponsoring local youth teams or clubs, supporting community events, and the like.

7. Many wholesaling career opportunities are available in selling for people who provide information and services, promote the product, as well as for those who actually sell the merchandise.

8. Outside salesmen, specialty salesmen, and sales engineers are highly skilled sales-service personnel who usually begin their careers with three to five years experience in the warehouse to learn the merchandise and the business operation.

9. Some of the selling career opportunities available in wholesaling according to their career levels are:

JOB ENTRY

Cashier	works in counter sales department handling exchange of money, ringing up sales, writing orders.
Copywriter	obtains the necessary information about the products or business and prepares the original copy for an advertisement.
Illustrator	creates a picture or design to favorably show a product or the business described in the copy of an advertisement
Salesclerk	arranges, straightens, and prices merchandise in the counter sales area; assists customers in selecting and locating merchandise.
Sign Writer	creates by hand or machine any necessary display showcards, posters, signs, or other visual promotional aids.
Display Assistant	orders materials and supplies for the display man; keeps an inventory of all props, trimmings, tools, etc.; checks display signs and cards for accuracy.

ADVANCED CAREER

Auctioneer	provides information about merchandise to a group of customers, opens and closes offers (bids) made to buy.

Counterman	assists customers in determining goods (often parts or supplies) that are needed, obtains or orders the merchandise from the warehouse, and completes the sale.
Ad Layout Man	assembles all of an advertisements parts into attention-getting, attractive presentation for a product or business
Display Assembler	designs, develops, and constructs special displays, such as point-of-purchase displays, props, and trimmings.
Display Man	arranges the merchandise and props into an attractive design as created by the designer; in smaller businesses he may assume the roles of the designer, technician, trimmer, and the sign writer.
Territory Salesman	sells and services business customers for a certain region in the wholesaler's service area.
Routeman	sells and delivers merchandise from a truck to customers in a certain area on a regular basis.
Order Dispatcher	receives orders by telephone or mail, processes orders, and notifies the shipping department.
Rack Salesman	sells, services, and delivers merchandise to retail customers.
Counter	inventories the stock of retail customers and writes orders for replacement of basic stock

MANAGEMENT/SPECIALIST

General Manager	top executive of a wholesale business who supervises and coordinates all activities and personnel within the business.
Route Supervisor	oversees all activities of route sales and deliveries of goods to business customers.
Sales Manager	hires, fires, trains, and supervises all sales personnel for the business.
Advertising Man	plans advertising program for a business and its products in conjunction with the sales manager; develops such items as brochures, handbills, etc.; in smaller businesses serves as the liaison with an advertising agency for development of the necessary promotional plans.
Public Relations Man	plans and promotes programs to favorably promote publicity and goodwill for a business.
Sales Engineer	provides technical knowledge and skills as a special service to customers.
Sales-Service Supervisor	coordinates activities of inside counter sales personnel, including countermen, salesclerks, and cashiers.
Specialty Salesman	sells and services specific products carried by a wholesaler throughout its service area.

10. During the selling process, the customer proceeds through four major steps in satisfying his wants or needs by purchasing a product or service. These psychological steps of a sale are:

Attention	customer becomes aware of the product or service
Interest	customer wants to know more about the good or service
Action	customer indicates he will buy the good or service

11. An effective salesman takes ten steps in satisfying his customer and completing the sale:

Prospecting	process of seeking and finding possible customers.
Preapproach	procedure of obtaining information about your prospect and product.
Approach	greeting the customer and opening the sale.
Determining Needs	finding out how, for what, and by whom the product is to be used.
Presenting Merchandise	explaining and showing the product as it would be used.
Overcoming Objections	emphasizing the benefits of the product and services of the seller.
Closing Sale	bringing the customer to a positive buying decision.
Plus Selling	attempting to sell the customer higher quality or additional goods.
Closing	completing the sales transaction by writing a purchase order, ringing up a sale, etc.
Follow-Up	contacting the customer at a later date to determine his satisfaction and offer additional service.

Equipment

1. Overhead projector, chalkboard, bulletin board
2. Filmstrip projector, 16mm film projector, slide projector
3. Video tape recorder, record player, cassette tape recorder

Materials

1. Films: "Ad-Ventures" "Careers in Sales" "Careers-Sales"
   "Is a Sales Career For You?" "Careers in Broadcast News"
   "Opportunities in Sales and Merchandising" "The Journalists"
   "Is a Career in Radio or Television for You?"
2. Filmstrips: "Art Careers in Advertising" "Career Game"
   "Career Exploration: Persuasive Interest"
   "Careers in Illustration" "Careers in Journalism"
   "Careers in Show Business" "Careers in Television"
   "Selling as a Career" "Writing Careers in Advertising"
3. Slides: "Careers in Food Merchandising" "Careers in Home Furnishings"
   "Understanding Wholesaling"
4. Cassette Tapes: "Career Development Series" Imperial Films
   "Careers Unlimited Series" Classroom Productions
5. *Advertising: A Career of Action and Variety*

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6. *Career Opportunities,* New York Life Insurance
7. *Career Opportunities: Marketing, Business, and Office Occupations*
8. *Career World Magazine*
9. *Careers Briefs,* Careers Publications
10. *Consider a Career in Public Relations,* Chronicle Guidance Publications
11. *Dictionary of Occupational Titles,* Volumes I and II
12. *Distributive Career Series,* Fairchild Publications
13. *Encyclopedia of Careers and Vocational Guidance*
14. *Finding Your Job Booklets,* Finney Company
15. *Jobs in Advertising*
16. *Modeling Careers: Glamour and Hard Work*
17. *Occupational Briefs,* Chronicle Guidance Publications
18. *Occupational Briefs,* Science Research Associates
19. *Occupational Guidance Booklets,* Finney Company
20. *Occupational Guide Series,* California Department of Employment
21. *Occupational Outlook Handbook,* U.S. Department of Labor
22. *Occupations and Careers,* Webster-McGraw-Hill
23. *Project Loom Units,* Florida State University
24. *The Salesman,* Sales and Marketing Executives
25. *What Job For Me Book Series,* Webster/McGraw-Hill
26. *Widening Occupational Roles Work Briefs,* Science Research Associates

WHOLESALE SELLING SCENE – KEY

1. These selling careers in wholesaling may have been identified:

Job Entry	*Advanced Career*	*Management*
Cashier	Ad Layout Man	Advertising Man
Salesclerk	Display Assembler	Public Relations Man
Stockman	Display Designer	Sales Engineer
Copywriter	Display Man	Sales-Service Supervisor
Illustrator	Order Dispatcher	Specialty Salesman
Display Assistant	Rack Salesman	Sales Promotion Director
Sign Writer	Counter	

When the student can provide 4 career titles for each level for a total of 12 careers, he will have satisfied objective #1.

2. These ten steps in personal selling should be identified in the order listed below:

1. Prospecting
2. Preapproach
3. Approach
4. Determining Needs
5. Presenting Merchandise
6. Overcoming Objections
7. Closing Sale
8. Plus Selling
9. Closing Mechanics
10. Followup

The student will achieve objective #2 when he lists 8 steps in the correct order for 80% accuracy.

3. The following sales force personnel, promotional methods, and customer services would be appropriate for the wholesaler.

Sales Personnel
Sales Manager
Territory Salesman
Counter
Counterman
Salesclerk
Order Dispatcher
Advertising Man
Display Man
Sales-Service Supervisor

Promotional Methods
Jewelry Boxes
Direct Mail
Catalog
Display Cards/cases

Customer Services
Packaging
Pricing
Credit
Labeling

If the student correctly names 12 of the 16 items for 75% accuracy, he will have demonstrated proficiency for objective #3.

WHOLESALE SELLING SURVEY – KEY

1. These selling careers in wholesaling may have been identified:

Job Entry
Cashier
Salesclerk
Stockman
Copywriter
Illustrator
Display Assistant
Sign Writer

Advanced Career
Ad Layout Man
Display Assembler
Display Designer
Display Man
Order Dispatcher
Rack Salesman
Counter

Management
Advertising Man
Public Relations Man
Sales Engineer
Sales-Service Supervisor
Specialty Salesman
Sales Promotion Director

When the student can provide 4 career titles for each level for a total of 12 careers, he will have satisfied objective #1.

2. These ten steps in personal selling should be identified in the order listed below:

1. Prospecting
2. Preapproach
3. Approach
4. Determining Needs
5. Presenting Merchandise
6. Overcoming Objections
7. Closing Sale
8. Plus Selling
9. Closing Mechanics
10. Followup

The student will achieve objective #2 when he lists 8 steps in the correct order for 80% accuracy.

3. The following sales force personnel, promotional methods, and customer services would be appropriate for the wholesaler.

Sales Personnel
Sales Manager
Territory Salesman
Counter
Counterman
Salesclerk
Order Dispatcher
Advertising Man
Display Man
Sales-Service Supervisor
Sales Engineer
Specialty Salesman

Promotional Methods
Technical Information/Advice
Direct Mail
Catalog
Display Cards/cases
Specialties
Trade Journals

Customer Services
Packaging
Pricing
Credit
Labeling
Shipping
Delivery
Consultation
Adjustments

If the student correctly names 12 of the 16 items for 75% accuracy, he will have demonstrated proficiency for objective #3.

LEARNING ACTIVITIES

UNIT TITLE *Selling for a Wholesaler* UNIT # *3* OBJECTIVE # *1*

Group

1. Give each student a copy of Student Handout #30: "Sales Career Please" and give the group about fifteen minutes to guess the career titles. After about fifteen minutes, ask students to reveal the different career titles they have uncoded. After each title have students explain what they think that person does. Provide an explanation of each before going on to the next one.

2. Obtain copies of career reference books, including the *Dictionary of Occupational Titles, Encyclopedia of Careers and Vocational Guidance, Occupational Outlook Handbook*, and *Handbook of Job Facts.* Make a Sales Career Chart showing each of the personal selling careers by their career level and place it on the bulletin board.

   Give each student a copy of the Special Activity Sheet #2: "Career Exploration Chart." Have each student select one of the career titles to investigate. Have each student complete the career exploration chart. Back them with different colored pieces of construction paper and display them around the room. Have each student give a two minute review of each career, including the career title and career level at the beginning and ending of his review.

3. After you have covered the material included in Student Handout # 31, have each student select a selling career of interest to him for each of the three major career levels — job entry, advanced, and management/specialist. Have each student select career titles from the list contained in the above handout. Ask each student to select one of the following statements for each of his chosen careers, so that he has a different statement for each of them:

   I find it very easy to get along with all kinds of people.

   The quality of my written work is always very neat and accurate.

   I dress in a very neat and fashionable way.

   My self-control and confidence have been developed through perseverance.

   I have a great deal of imagination and creative ability.

   My educational background includes a four-year college degree.

   I have foresight in seeing what needs to be done.

   Paperwork at a desk is what I enjoy doing most.

   I have an outstanding speaking voice and vocabulary.

   My interest and enthusiasm have furthered my career.

   Explain to the students that you want them to write a character sketch of each of the three careers in sales selected. Each of them should be written from the standpoint of the statement that was selected. When all of the students have completed their character sketches, have each student exchange sketches with another student. Let the students question each other. Rotate around the room and select some sketches for students to read. Have students identify the careers in the character sketches, the management level of the career, and a brief explanation of the job duties. Review some other career titles, job descriptions, and career level classifications that were included in the Student Handout.

Individual

1. Provide the learner with a copy of Student Handout #31: "Selling for a Wholesaler-Distributor" and have him study the information in the handout. After he has read the material, ask him to complete the Sales Overview following it. Review the answers to the completion items and the sales career titles and levels with him.

2. Give the student a copy of Student Handout #32: "Situations in Selling". Have him complete the handout. Explain to him that there are no right or wrong answers. When he has finished the exercise, discuss the situations with him. Relate other selling careers and their levels to him. Emphasize that retail selling positions include many kinds of jobs, not just the department store salesclerk that most people know.

3. Provide the learner with Student Handout #33: "Sales Career Stumper." Explain to the student that he will form the cross by connecting twelve of the circles with one continuous line. Emphasize that the twelve circles include personal selling and sales promotion careers.

Special Media

1. Films: "Ad-Ventures" "Careers in Sales" "Careers-Sales"
   "Is a Sales Career For You?" "Careers in Broadcast News"
   "Opportunities in Sales and Merchandising" "The Journalists"
   "Is a Career in Radio or Television for You?"
2. Filmstrips: "Art Careers in Advertising" "Career Game"
   "Career Exploration: Persuasive Interest"
   "Careers in Illustration" "Careers in Journalism"
   "Careers in Show Business" "Careers in Television"
   "Selling as a Career" "Writing Careers in Advertising"

LEARNING ACTIVITIES

UNIT TITLE *Selling for a Wholesaler* UNIT # *3* OBJECTIVE # *2*

Group

1. Distribute copies of the Student Handout 34: "Steps in Wholesale Selling" to each student. Allow them about ten minutes to find their way through the maze from the salesman to the satisfied customer. If possible, make an overhead transparency of the maze.

   Alternate asking students to identify the steps in order as they are performed in personal selling and found in the maze. As each step is told, ask students to explain what they think is meant by each one. Explain to the students that these steps apply to all selling in wholesale businesses. Emphasize that although prospecting is probably exercised less frequently than counter sales it probably should be done more by sales people. Tell students that some prospecting is achieved through advertising to gain attention of possible customers.

2. Provide each student with a copy of the Student Handout #35: "Selling Spiral." Have each student complete the puzzle as directed. Remind them that the steps are in order beginning with the first description.

   After students have completed the puzzle ask them to think of a sales situation with a wholesaler of interest to them. Ask each student to select one of the ten steps and write a short paragraph describing the step in that situation. Call on various students to read their paragraphs. Have others in the group guess the personal selling step involved and the type of wholesalers.

3. Write the ten steps in personal selling on the chalkboard or overhead projector as shown below. Ask each student to write a number from 1-10 next to each step on a piece of paper. Explain that the number one should be placed next to the step which the student feels is most important in completing the sale, number ten next to the step he feels is least important. After each student has written the steps and a number for each on a piece of paper, have students divide into groups of four to six to discuss their responses. Have each group select a discussion leader. Ask the students to see if they can arrive at common ranking of the steps within their group. Ask each group leader to report the group's results to the class.

   Prospecting
   Preapproach
   Approach
   Determining Needs
   Presenting Merchandise
   Overcoming Objections
   Closing Sale
   Plus Selling
   Closing Mechanics
   Follow-up

Individual

1. Give the student a copy of Student Handout #36: "Satisfying Steps in Selling." Have him study the information about the steps in selling, sales supporting activities, and job duties of key sales personnel. When he has finished, discuss a salesman's activities including the steps of a sale. Use a situation to explain the ten steps that an effective salesman performs.

   Ask the student to complete the exercises following the information. When he has completed each part, review them with him. Emphasize the different activities a salesman performs and the order in which the ten steps of a sale are performed.

2. Provide the student with a copy of the Student Handout #37: "Wholesale Selling Puzzler." Remind the student that the scrambled letters form the ten steps of a sale in the order which they occur. After the student has completed the puzzle, discuss each of the steps giving examples of them in practice.

Assign the student an advertising project in which he will collect samples of different types of advertising, such as: journals and magazine ads, handbills, brochures, match covers, pencils, etc. Have him review a radio spot and television commercial. Obtain space around school – in the hallways, library, guidance, etc. – Have the student display the materials including a title that relates advertising careers. Such a title might be: "Career Activities of Advertising Workers." If possible, find illustrations of people in the various advertising careers. Display these with the career titles around the ad materials.

Special Media

1. Cassette Tapes: "American Occupations" Series, Jasper Ewing and Sons
   Auto Parts Counterman, Auto Salesman, Cashier
2. *Career Briefs,* Careers Publications
3. *Career Opportunities: Marketing, Business, and Office Occupations*
4. *Careers Booklets,* Institute of Research
5. *Dictionary of Occupational Titles*
6. *Encyclopedia of Careers and Vocational Guidance,* Volumes I and II
7. *Finding Your Job Series,* Finney Company
8. *Handbook of Job Facts,* Science Research Associates
9. *Occupational Briefs,* Chronicle Guidance Publications
10. *Occupational Briefs,* Science Research Associates
11. *Occupational Guidance Booklets,* Finney Company

LEARNING ACTIVITIES

UNIT TITLE *Selling for a Wholesaler* UNIT # *3* OBJECTIVE # *3*

Group

1. Have each student take out a slip of paper. Tell the group they are going to participate in a game activity called "Sales Stop." Explain to the students that they will be timed for one minute. During this time ask them to write down all the wholesale sales careers that could be found in a merchant wholesaler's business.

   At the end of one minute, divide the students into pairs. Allow the pairs two minutes to compare answers and compile a list of the sales careers. Call "stop" and place students into groups of four. Have these students compare answers for four minutes. At the end of four minutes, call "stop" to end the game. Have each group select a recorder to write the career titles in wholesale sales on the chalkboard.

   Have the class check the career titles and pick the winning sales team. Discuss other types of wholesalers and the sales forces that they would employ. Include auction companies, grain elevators, chain warehouses, and producer's sales outlets.

2. Give each student a copy of Student Handout #38: "Career CBA's" or explain the rules to the group. Have each student prepare 6 sets of questions, one each for six different types of wholesale businesses. Since each set contains three questions, one each for careers, businesses, and activities, it would be helpful to put the questions in each set on three different colored pieces of paper.

   Play the game as directed. When it is over, review the different types of wholesale businesses and the sales careers that most likely would be found in each of them.

3. Divide the class into pairs and have students alternate as customer and salesman. Allow them fifteen minutes to practice. When the time is up, split the class into two teams, so that each pair remains on the same team. Flip a coin to see which team will go first. Have the first pair of that team present one of their sales situations within one or two minutes. The opposing team has thirty seconds to collaborate and tell the wholesale sales career title and for whom he works in the situation that was enacted. If the team is correct, they earn one point.

   If that team does not answer correctly, the team whose players acted may guess the career and business. If they are correct, they receive one point and continue their turn in guessing a sales situation represented by a pair from the opposing team. If they were incorrect in guessing the career and business missed by the opposing team, they still receive their regular turn and are not penalized for missing it. The team with the greatest number of points wins.

Individual

1. Give the student a copy of Student Handout #39: "Classified Selling Careers" and several different newspapers, preferably from different cities. Explain to the student that he is to find classified ads for different wholesale sales careers in various types of wholesale businesses. When he has compiled his classified ads and glued them on his sheets, discuss the various wholesale sales careers that can be found within the different types of wholesaler-distributors.

2. Provide the student with a copy of Student Handout 40: "Selecting a Sales Team." Explain to the student that he is to decide which wholesale selling personnel would be employed in each of the businesses and place an "X" in the appropriate boxes. When he has made his decisions, review his conclusions with him.

3. Ask the student to bring a shoe box or some other small cardboard box to class. Accumulate the following materials: construction paper, glue, scissors, tape, magic markers, crayons, posterboard, paper dolls, small jewelry boxes, miniature furniture and cars. He can bring many of these from home, as well as other things which may be needed.

Ask the student to pick a kind of business of interest to him and a product carried by that business. Explain to the student that he will assume the roles of all display workers that would be involved in creating a display. Discuss with him the order in which the display workers would become involved beginning with the display manager and the display designer. Question him so that he arrives at the conclusions, such as: (1) the sales manager decides what will be displayed in conjunction with other department managers; (2) the display designer plans the display on paper; (3) the display assistant cleans and prepares the display area.

Ask the student to explain which types of displays he feels would be most effective for the product his customer would promote and why. Have him decide which other types of sales promotion methods could be used by his type of customer for the particular product. Review the kinds of sales promotion careers involved in performing the various sales promotion activities.

4. Obtain the following equipment, materials, and supplies: tape recorder and tapes, video tape recorder and video tapes, a typewriter, signpress or lettering kit, white paper 8½" x 11", rulers, glue, scissors, pencils, crayons, magic markers, felt tip pens, masking tape, scotch tape, old magazines and newspapers, construction paper, posterboard.

   Ask the student to select a wholesale business and a product of interest to him. If possible, it should be the same as for the display project above. Explain to the student that he is going to develop a sales promotion campaign including advertising, sales promotion techniques, and public relations or publicity. Have him create an advertisement of his choice: newspaper or magazine advertisement, 1 minute radio spot, 1 minute television commercial, a small billboard, or a flyer. Ask him to create a plan for a special promotional technique, such as: samples, coupons, product demonstration, or contest. Have him prepare a news release about the business, either as a newspaper story or as a radio or television feature.

   Discuss with the student throughout the project the types of sales promotion methods including dealer bids and special customer services that would be most effective for (1) that particular type of wholesale business, (2) that particular type or line of product, and (3) that particular type of customer.

Special Media

1. *Occupational Briefs,* Chronicle Guidance Publications
2. *Occupational Briefs,* Science Research Associates
3. *Occupational Guidance Booklets,* Finney Company
4. *Occupational Guide Series,* California Department of Employment
5. *Occupational Outlook Handbook*, U.S. Department of Labor
6. *Project Loom Units,* Florida State University
7. *The Salesman*, Sales and Marketing Executives
8. *What Job For Me Book Series,* Webster/McGraw-Hill
9. *Widening Occupational Roles Work Briefs,* Science Research Associates

working in a warehouse

WORKING IN A WAREHOUSE

(Unit Overview)

Competency

Ability to relate the roles which warehousing personnel play in the flow of different kinds of merchandise through a wholesale business.

Objectives

1. Given ten warehousing career titles and their descriptions, the student will match each career title to its appropriate description with 80% accuracy. (knowledge)

2. Given five wholesale situations in the warehousing department, the student will explain which careers and forms are involved in the situations with 80% accuracy. (comprehension)

3. Given the description of a wholesaler and its merchandise, the student will design a warehouse with the appropriate storage facilities and processing areas, and select ten warehouse career employees to work in the warehouse with 75% accuracy. (application)

Concepts

1. The warehouse of a wholesaler handles all merchandise entering and leaving the business, as well as the storing or stocking of it.

2. Receiving personnel check the incoming merchandise against the order and invoice to be certain the correct amounts, sizes, quality, etc., have been sent. They are also responsible for the unpacking, pressing, pricing, assembling, inventorying, and storing merchandise.

3. Shipping employees are charged with selecting, assembling, packing, and sending the correct merchandise ordered by customers. They must pack the products appropriately and choose the most suitable means of transportation available.

4. The warehouse usually encompasses the marketing functions of storage, transportation, standardization, and risk. In some cases it may be involved in buying through orders of staple stock and selling through phone or mail orders.

5. All activities in the warehouse may be classified into five major areas:

   Receiving – unloading of delivered goods, inspection of number and condition of parcels, review of shipping methods and charges by supplier.

   Checking – unpacking and inspection of incoming merchandise or review of outgoing orders for quantity, sizes, kind, quality, etc.

   Marking – printing and attachment of merchandise tickets for goods and storage areas; assembling and preparing goods for delivery or storage areas.

   Stockkeeping – effective storage of merchandise in bins or on shelves, supply of needed merchandise to the selling area, inventory and inspection of merchandise in storage and selling areas.

   Shipping – returning damaged merchandise to supplier; picking, and packing merchandise for delivery or shipment to customers.

6. Some of the wholesale warehousing careers frequently found are:

   a. *Receiving supervisor* – coordinates all receiving, inventorying, and storing activities of incoming merchandise.

   b. *Receiver* – checks all incoming merchandise against the purchase order and packing slip; sometimes called a receiving clerk.

   c. *Materials Handler* – transports products between the dock, receiving, shipping, and storage areas by hand or with equipment.

   d. *Checker* – inspects the incoming or outgoing merchandise for correct sizes, amounts, colors, quality, etc.

   e. *Marker* – prepares merchandise tickets for incoming or outgoing goods and attaches the tickets to the products; sometimes makes shipping labels.

   f. *Stockman* – stores and arranges incoming merchandise, prepares bin tickets, and keeps the stock orderly.

   g. *Inventory Control Clerk* – checks merchandise in stockroom to determine amounts on hand, slow- and fast-moving items; shortages, etc.

   h. *Merchandise Distributor* – serves as a liaison between the buying and shipping/receiving departments of branch or chain retailers by allocating goods to the various stores.

   i. *Merchandise Cataloguer* – responsible for identifying and classifying all merchandise received into an effective stock system for easy location.

   j. *Merchandise Detailer* – identifies and classifies specific types of incoming merchandise according to amounts, styles, sizes, colors, etc.

   k. *Stock Supervisor* – coordinates and directs all stockkeeping activities and personnel.

   l. *Order Dispatcher* – receives incoming orders by mail or telephone from customers desiring certain merchandise.

   m. *Shipping-Supervisor* – coordinates all selection, packing, and distributing activities for outgoing merchandise.

   n. *Shipper* – checks the customer's order against the packing slip to be certain the correct merchandise is being sent.

   o. *Order Picker* – selects the outgoing merchandise from the shelves, bins, etc., which is to be packed and shipped.

   p. *Packer* – assembles merchandise to be shipped, selects an appropriate container, wraps and arranges the goods in the box, seals the box.

   q. *Traffic Supervisor* – oversees all delivery activities; selects the best method of transportation to be used.

   r. *Route Dispatcher* – assigns deliverymen the areas in which they will deliver merchandise to customers or commercial shipper.

s. *Deliveryman* – transports the retailer's merchandise from the business to the customer or a commercial carrier.

t. *Tracer* – communicates with customer, deliverymen, and commercial carriers regarding lost or damaged merchandise.

u. *Warehouse Manager* – supervises all wholesale warehouse activities.

v. *Warehouseman* – performs all job responsibilities of receiving, checking, marking, storing, and shipping in a warehouse.

7. In large businesses all of the job titles may be involved. Some may become more specialized, such as telephone order dispatcher, loading checker, and shipping handler. In many smaller businesses, all or some of the job duties may be done by one person, called a warehouseman.

8. Some of the important forms and records involved in the shipping and receiving department are:

a. *Purchase Order* – Wholesaler's copy of merchandise that was ordered from a supplier, usually by a company buyer, or the order from the wholesaler to his supplier.

b. *Vendor's Invoice* – supplier's bill for merchandise shipped to the wholesaler according to the purchase order received, or the wholesaler's bill to his customer.

c. *Packing Slip* – itemized paper in container showing contents shipped, including styles, colors, sizes, and quantities.

d. *Inventory Control Sheet* – form identifying price and characteristics of merchandise that is in stock.

e. *Stock Record Card* – current detailed information about the amounts of merchandise received, sold, and on hand by individual item.

f. *Merchandise Ticket* – small slip of paper providing information such as the price, style number, manufacturer, size, and date received.

g. *Bin Ticket* – marker affixed on storage shelves or bins which identifies the merchandise stored in that area.

h. *Receiving Record* – report of date, quantities, descriptive details, and condition of incoming merchandise.

i. *Stock Requisition* – form used to authorize the removal of goods from the stockroom to the sales floor or shipping area.

j. *Bill of Lading* – contract agreement between the seller (shipper) and the carrier for the carrier to deliver goods to the buyer.

k. *Shipping Record* – report of date, quantities, detailed characteristics, method of shipment, and carrier for outgoing goods.

l. *Shipping Label* – identifying paper on the outside of a container packed with outgoing merchandise showing the buyer to whom it is being sent and the seller who is sending it.

Equipment

1. Overhead projector, chalkboard, bulletin board
2. Slide projector, 16mm film projector

Materials

1. Film: "Tell It Like It Is"
2. Pamphlet: *Career Opportunities in Wholesaling,* NAW
3. *Career Briefs,* Careers Publications
4. *Career Opportunities: Marketing, Business, and Office Occupations*
5. *Careers Booklets,* Institute of Research
6. *Dictionary of Occupational Titles*
7. *Encyclopedia of Careers and Vocational Guidance,* Volumes I and II
8. *Finding Your Job Series,* Finney Company
9. *Handbook of Job Facts,* Science Research Associates
10. *Occupational Briefs,* Chronicle Guidance
11. *Occupational Briefs,* Science Research Associates
12. *Occupational Guidance Booklets,* Finney Company
13. *Occupational Outlook Handbook,* U.S. Department of Labor
14. *Occupations and Careers,* Webster/McGraw-Hill
15. *Project Loom Units,* Florida State University
16. *Widening Occupational Roles Work Briefs,* Science Research Associates
17. *Working for a Wholesaler,* Fairchild

Supplies

1. Posterboard, construction paper, white paper, merchandise tickets
2. Glue, scissors, masking tape, rulers, magic markers

Special Resources

1. Student Handouts #42-55
2. Commercial Games: "Ad-Lib" "RSVP"

THE WAREHOUSING SCENE – KEY

1. The following job titles should be identified:

   1. RECEIVER
   2. CHECKER
   3. MATERIALS HANDLER
   4. STOCKMAN
   5. SHIPPER
   6. ORDER PICKER
   7. MARKER
   8. ROUTE DISPATCHER
   9. DELIVERYMAN
   10. PACKER

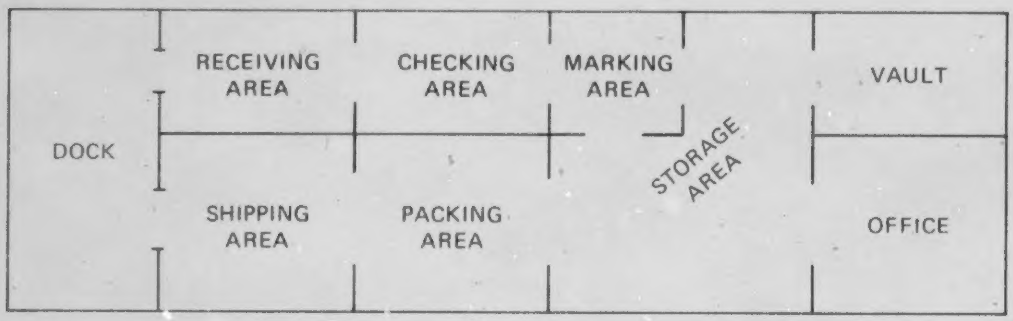
   The student will demonstrate sufficient knowledge for objective #1 if he correctly identified 8 of the job titles for 80% accuracy.

2. The career titles and forms involved in each situation are:

CAREERS	*FORMS*
a. Receiver	Receiving Report
b. Checker	Loss or Damage Claim
c. Marker	Merchandise Ticket
d. Stock Clerk	Stock Record Card
e. Shipper	Shipping Invoice

   If the student correctly identified 8 of the careers and forms for 80% accuracy, he will have satisfied objective #2.

3. The designed warehouse should include the following areas in the following sequence similar to the layout shown.



GENERAL MERCHANDISE WAREHOUSE

Any ten of the following careers would be acceptable:

Receiver
Checker
Marker
Stockman
Materials Handler
Order Picker
Packer
Order Dispatcher
Tracer
Freight-Rate Clerk
Shipper
Warehouse Manager

The student will demonstrate acceptable proficiency for objective #3 if he correctly answers 15 of the 20 parts for 75% accuracy.

THE WAREHOUSING SURVEY – KEY

1. The following letters should be identified:

   1. C
   2. D
   3. G
   4. A
   5. H
   6. J
   7. E
   8. I
   9. B
   10. F

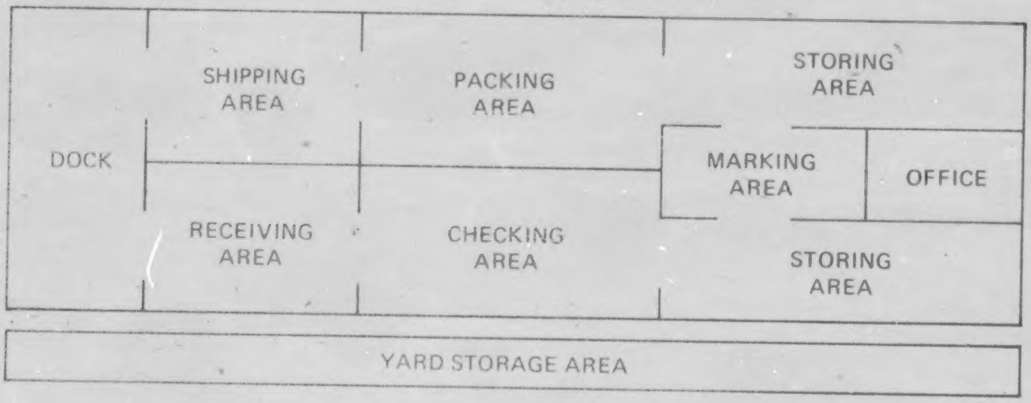
   A score of 8 correct answers or 80% on this test item will demonstrate acceptable knowledge for objective #1.

2. The career titles and forms involved in each activity are:

CAREERS	*FORMS*
a. Receiver	Bill of Lading
b. Checker	Packing Slip
c. Marker	Merchandise Ticket
d. Stock Clerk	Stock Requisition
e. Shipper	Shipping Record

   The student will demonstrate satisfactory understanding of the careers and forms for objective #2 when he correctly identified 8 of them for 80% accuracy.

3. The designed warehouse should include the following areas in the following sequence similar to the layout shown.


DOCK
SHIPPING AREA
PACKING AREA
STORING AREA
MARKING AREA
OFFICE
RECEIVING AREA
CHECKING AREA
STORING AREA
YARD STORAGE AREA

GENERAL MERCHANDISE WAREHOUSE

Any ten of the following careers would be acceptable:

- Receiver
- Checker
- Marker
- Stockman
- Materials Handler
- Order Picker
- Loader
- Deliveryman
- Packer
- Order Dispatcher
- Tracer
- Freight-Rate Clerk
- Shipper
- Warehouse Manager
- Route Dispatcher
- Traffic Supervisor

LEARNING ACTIVITIES

UNIT TITLE *Working in a Warehouse* UNIT # *4* *OBJECTIVE # 1*

Group

1. Ask the group if any of them knows anyone who works in a wholesale distributor's warehouse. Ask the group what they think the job responsibilities of wholesale warehousemen are. Discuss the five major areas of receiving, checking, marking, stocking, and shipping.

   Distribute the Student Handout #42: "Careers in the Wholesaler-Distributor Warehouse" to each student. After the students have read the information, have them complete the questions at the end of the material. Review the questions and the careers.

2. After you have covered the information in handout #42, write the five major areas or steps in the usual wholesale warehouse area on the chalkboard. Divide the class into five groups. Ask each group to prepare a short skit of less than five minutes concerning the personnel in the area which you have assigned them.

   Ask students to show in their skit how their area relates to the other four. Call on the groups to present their skits according to the flow of activities in the wholesale distributor's warehouse receiving, checking, marking, stocking, and shipping. Have the class critique each group's skit. Review the various careers that are involved in each area.

Individual

1. Give the learner a copy of the Student Handout #42 and allow him time to read it and answer the questions at the end. When he has completed it, review the careers with him. Discuss the role that each of them plays in the flow of merchandise into and out of the wholesaler's business.

   Give the learner a copy of Student Handout #43: "Warehouse Winners" and have him complete the decision-making activity as directed. When he has completed the handout, discuss his decisions with him. Why did he lay off the personnel that he did? Did he have a thorough understanding of their function in the warehouse? Review career titles and descriptions of other warehousemen who were not involved in the handout situation.

2. Give the student a copy of Student Handout #44: "Warehouse Winder" and have him complete the winding career puzzle as directed. When he has finished, check his answers and discuss other warehousing careers which were not included in the puzzle activity.

3. Provide the student with Student Handout #45: "Working in a Warehouse" and ask him to study the career information in the handout. After he has completed the career information, ask him to study each of the warehouse situations following the career information, and write down his reactions to each situation. After he has completed the five questions, discuss his answers with him concerning his attitudes about the various personnel and their activities.

Special Media

1. Film: "Tell It Like It Is"
2. Slides: "The World of Wholesaling"
3. *Career Briefs,* Careers Publications
4. *Career Opportunities: Marketing, Business, and Office Occupations*
5. *Careers Booklets,* Institute of Research
6. *Dictionary of Occupational Titles*
7. *Encyclopedia of Careers and Vocational Guidance,* Volumes I and II
8. *Finding Your Job Series,* Finney Company
9. *Handbook of Job Facts,* Science Research Associates
10. *Working for a Wholesaler,* Fairchild Publications

LEARNING ACTIVITIES

UNIT TITLE *Working in a Warehouse* UNIT # *4* OBJECTIVE # *2*

Group

1. Assign members of the class to the following warehouse career roles:

    Warehouse Manager – 1 student
    Materials Handlers – 2 or 3 students
    Receiving Clerk – 1 or 2 students
    Checkers – 2 or 3 students
    Markers – 2 or 3 students
    Inventory Control Clerk – 1 student
    Stockman – 2 or 3 students
    Packing Supervisor – 1 student
    Order Picker – 1 or 2 students
    Packers – 2 or 3 students
    Traffic Manager – 1 student
    Shipping Clerk – 1 or 2 students

    Create a sample storage warehouse scene with work stations identified in the room, including:

    Loading/Shipping Area
    Packing Section
    Stock/Storage Area
    Unloading/Receiving Area
    Checking/Marking Section
    Central Warehouse Office

    Simulate a typical warehouse situation involving the receipt of an order of merchandise, checking it, pricing, stocking it, packing it in smaller units, and shipping it to several businesses. Ask the students to decide the order in which they should be to most effectively do the jobs. If at all possible, your group might be able to provide some service to the school or community by unloading and unpacking boxes of items and packing them in smaller quantities. Use the forms in Student Handout #46: "Warehousing Forms," explain the purpose of them, and who uses them.

2. Divide the class into groups of five or six students and give each pupil a copy of the first sheet in Student Handout #47: "Warehouse Woes." Ask the students to read over the instructions. Review the instructions with all the students. Remind the group that they have 20 minutes to arrive at a "majority rule decision."

    At the end of the 20 minutes, have one student from each group write the career titles of personnel who would not be "laid off" on the board. Give each group a code name or number, so their conclusions can be quickly identified. When all of the lists are on the board, discuss each group's majority rule decision with the class. If students completed the Student Handout #43: "Warehouse Winners," have the group's answers compared with individual student's answers. Did the student change his mind? Did he know more now about the jobs than he did in the previous activity.

    Have each student complete the second sheet of this Student Handout #47. When the students have completed the sheet, review the various storage career personnel and their job tasks. Discuss the services that are provided and the order in which shipments are received, stocked, and shipping. Clarify the order in which warehouse careers are involved, and the forms which they use in performing their tasks.

Individual

1. Give the learner a copy of the Student Handout #48: "Warehousing Forms and Careers." Have him study the information. When he has read the material, ask him to complete the activity which follows it. Review the responses which he gives, emphasizing the forms and the personnel who use them.

2. Provide the student with the Student Handout #49: "Who, What, and Where in the Warehouse." Ask the student to study the careers and forms and decide in which of the five areas each belongs. Have him place that corresponding letter in a blank of that area's box. Remind him that some letters will be used more than once because some forms are involved in more than one area.

3. After the student has covered the information about forms and careers in the Student Handout #50: "Warehouse Activities" ask him to complete the chart at the end of the handout. Explain to the student that he is to decide which career personnel use which forms and place an "X" in the appropriate boxes. Review his decisions with him after he has completed the exercise. Relate to him how each job title uses the form in performing his tasks.

Special Media

1. *Occupational Briefs,* Chronicle Guidance
2. *Occupational Briefs,* Science Research Associates
3. *Occupational Guidance Booklets,* Finney Company
4. *Occupational Outlook Handbook,* U.S. Department of Labor
5. *Occupations and Careers,* Webster/McGraw-Hill
6. *Project Loom Units,* Florida State University
7. *Widening Occupational Roles Work Briefs,* Science Research Associates

LEARNING ACTIVITIES

UNIT TITLE *Working in a Warehouse* UNIT # *4* OBJECTIVE # *3*

Group

1. After the group has covered the information in Student Handout #51, divide the class into groups of four or five students. Give each group a copy of Student Handout #52: "Designing a Warehouse."

   Have each group sketch its warehouse on a sheet of paper and develop the final layout on posterboard, construction paper, or cardboard. The layout may be drawn or areas may be constructed with small boxes, cardboard strips, sticks, etc. Supply each group with glue, tape, scissors, rulers, and magic markers. Have them complete the layout as explained.

2. Give each student Student Handout #53: "What Goes Where in the Warehouse." Have each student read the situation and answer the questions. Ask the students to sketch a warehouse that will store all the items given and include all other areas which are needed, such as receiving and packing sections.

   Have each student list ten marketing careers that could be employed in the warehouse. Ask students to circulate their sketches. Discuss the different layouts and careers that were named.

Individual

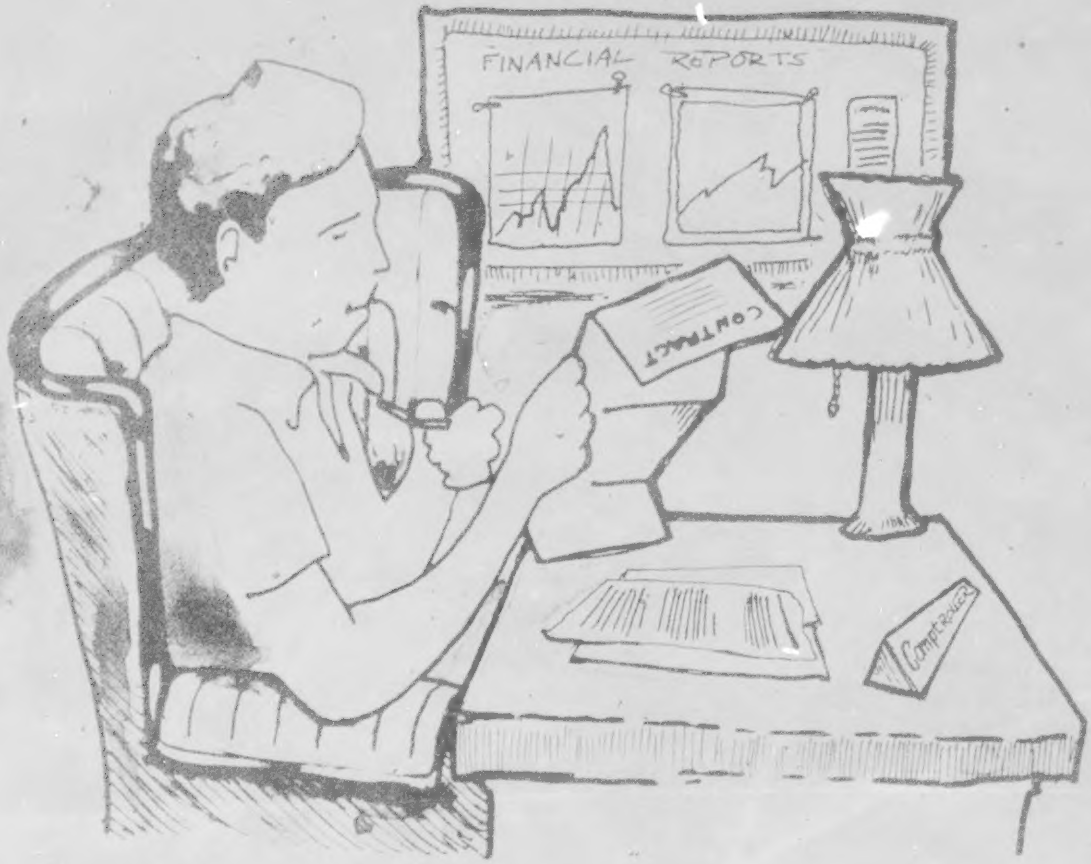
1. Provide the learner with Student Handout #51: "The Warehouse Layout," and have him study the information. When he has finished studying the information, have him complete the questions and activities following the material. Review his responses with him. Review the various areas which may be indicated in a warehouse and the marketing careers that may be involved.

2. After the student has covered the information in Student Handout #51, give him Student Handout #54: "Warehouse Decisions," and have him make the necessary decisions. Have him label the warehouse areas in the diagram shown. Ask him to name ten warehousing jobs that could be involved and list them on the back. Review his decisions with him.

3. As an extra activity for an advanced student, provide him with Student Handout #55: "Warehouse Location." Have the student study the material and complete the activities included. Discuss the activities with him reviewing the factors involved in selecting a suitable warehouse location.

Special Media

1. *Career Briefs,* Careers Publications
2. *Careers Booklets,* Institute of Research
3. *Dictionary of Occupational Titles*
4. *Encyclopedia of Careers and Vocational Guidance*
5. *Handbook of Job Facts*
6. *Occupational Briefs,* Chronicle Guidance
7. *Occupational Guidance,* Science Research Associates
8. *Project Loom Units,* Florida State University
9. *Widening Occupational Roles Work Briefs*


FINANCIAL REPORTS
CONTRACT
Comptroller

finance and the wholesaler

FINANCE AND THE WHOLESALER

(Unit Overview)

Competency

Ability to relate the financial activities and careers of a wholesaler to the operation of the business.

Objectives

1. Given ten wholesale finance career titles and their descriptions, the student will match each career title to its description with 80% accuracy. (knowledge)

2. Given ten financial activities of a wholesaler, the student will distinguish the finance career titles involved in each activity with 80% accuracy. (comprehension)

3. Given a wholesale financial situation, the student will predict the careers which would be involved in handling the financial situation with 80% accuracy. (application)

Concepts

1. The Marketing function of finance handles the credit and control activities of a wholesaler.

2. The credit and control activities in which a wholesaler engages include:
   a. offering credit to customers.
   b. maintaining and collecting credit accounts.
   c. handling and controlling receiving, shipping and checking reports.
   d. paying the bills of the wholesaler.
   e. handling the wholesaler's payroll.
   f. controlling the costs of doing business.

3. Many career opportunities are available in finance with the wholesaler:

Accounting Manager	establishes and maintains accounting systems for the business.
Accounts Payable Clerk	figures payments and dates due on goods bought by the business.
Credit Authorizer	approves or disapproves credit customers, limits, and extensions.
Comptroller	directs all financial activities, reports, and personnel of the business.
Credit Clerk	handles payments on accounts and various credit activities.
Credit Collector	contacts delinquent accounts to obtain money owed to the business.
Credit Investigator	checks past history and current status of business applicant's character, capacity, and capital.
Credit Manager	supervises all credit and collections employees and activities for the firm.
Inventory Control Clerk	keeps records of merchandise by size, style, color, price, etc.
Accounts Receivable Clerk	[illegible]es dates, discounts, and payments for customer accounts.
Merchandise Control Manager	supervises inventory control activities for the wholesaler.

Payroll Clerk	records employee working hours and figures the payroll.

4. Wholesalers offer a variety of dating terms to their customers for the payment of merchandise. The most common terms include:

   EOM – payment is due the number of stated days from the "end of the month" in which the invoice is dated.

   ROG – billing is calculated from the "receipt of goods" date rather than invoice date.

   Extra Dating – time for payment is extended a certain number of days, (usually 30, 60, or 90) from the date given.

   Postdating – additional time provided for payment by dating the invoice after the goods have been shipped.

   N.30 – payment is due thirty days from the date of the invoice.

   2/10 – two percent discount is allowed if payment is made within ten days of the invoice date; percentages indicated by the first number may vary.

5. Credit Applicant's are judged according to three major factors:

   a. *Character* – firm's sense of responsibility

   b. *Capacity* – company's ability to pay

   c. *Capital* – business' wealth

Equipment

1. Filmstrip projector, 16mm movie projector, cassette tape recorder.
2. Overhead projector, chalkboard, bulletin board.

Materials

1. Films: "Credit" "The Littlest Giant"
2. Filmstrips: "The Exploited Generation"
3. *Career Opportunities: Marketing, Business, and Office Specialists*
4. *Career World Magazines*
5. *Career Briefs*, Careers Publications
6. *Dictionary of Occupational Titles*, Volume I
7. *Encyclopedia of Careers and Vocational Guidance*, Volume I
8. *Finding Your Job Booklets*
9. *Handbook of Job Facts*
10. *Occupational Briefs*, Chronicle Guidance
11. *Occupational Briefs*, Science Research Associates
12. *Occupational Guidance Booklets*
13. *Occupation Guide Series*

14. *Occupational Outlook Handbook*
15. *Occupations and Careers*
16. *Widening Occupational Roles Work Briefs*
17. *Your Job in Distribution*

Supplies

1. Posterboard, construction paper, standard white paper
2. Glue, tape, scissors, rulers, felt tip pens
3. Magazines, newspapers, shoe boxes

Special Resources

1. Student Handouts #56-64
2. Slides from class field trip
3. Guest Speaker

THE WHOLESALE FINANCE SURVEY – KEY

1. The following career titles should be identified:
    - a. Comptroller
    - b. Authorizer
    - c. Credit Clerk
    - d. Collector
    - e. Accounts Receivable Clerk
    - f. Investigator
    - g. Credit Manager
    - h. Inventory Control Clerk
    - i. Merchandise Control Manager
    - j. Accounting Manager

    The student will achieve objective #1 if he correctly identifies 8 careers for 80% accuracy.

2. These wholesale finance careers were involved in the given activities.
    - a. Credit Clerk
    - b. Credit Collector
    - c. Accounts Receivable Clerk
    - d. Credit Investigator
    - e. Credit Manager
    - f. Inventory Control Clerk
    - g. Merchandise Control Manager
    - h. Accounting Manager
    - i. Comptroller
    - j. Credit Authorizer

    A score of 8 correct answers for 80% accuracy will satisfy objective #2.

3. The following decisions should have been made:

approved	no	character	no
capacity	no	capital	no

The following careers were involved:

credit clerk
credit manager
credit investigator
credit authorizer

If the student answers 6 of the 8 items correctly for 75% accuracy, he will have achieved acceptable proficiency for objective #3.

THE WHOLESALE FINANCE SCENE – KEY

1. The following careers should have been matched:
    - a. Credit Collector
    - b. Credit Investigator
    - c. Credit Manager
    - d. Inventory Control Clerk
    - e. Accounts Receivable Clerk
    - f. Merchandise Control Manager
    - g. Comptroller
    - h. Authorizer
    - i. Credit Clerk
    - j. Collector

   The student will demonstrate sufficient knowledge for objective #1 if he correctly matches 8 careers for 80% accuracy.

2. The wholesale finance careers involved in the activities are:
    - a. Credit Clerk
    - b. Collector
    - c. Inventory Control Clerk
    - d. Investigator
    - e. Credit Manager
    - f. Inventory Control Clerk
    - g. Merchandise Control Manager
    - h. Credit Clerk
    - i. Comptroller
    - j. Authorizer

   If the student correctly identified 8 careers for 80% accuracy, he will achieve objective #2.

3. The following decisions should have been made:

Approved	no	Character	no
Capacity	no	Capital	no

   These wholesale finance jobs were involved in this situation:

   Credit Clerk
   Credit Manager
   Credit Investigator
   Credit Authorizer

   The student will satisfy objective #3 when he accurately predicts 6 out of 8 answers for 75% accuracy.

LEARNING ACTIVITIES

UNIT TITLE *Finance and the Wholesaler* UNIT # *5* OBJECTIVE # *1*

Group

1. After you have covered the information in Student Handout #56: "Careers in Wholesale Finance," invite a comptroller from a large local wholesale firm. Ask him to bring other people from his office if possible. Explain to the manager that you want your students to be familiar with the various career opportunities available within the credit and control field. Tell him that you are interested in those careers housed in central finance offices for a company, such as credit authorizers, as well as those in a branch warehouse.

   Prepare the students for the speaker and his possible employees. Have each student prepare five pertinent questions which he might ask the comptroller. Assign a host and a hostess to greet the speaker when he arrives. If possible, prepare a certificate of appreciation which you can give to him and other businessmen in the community.

2. Give each student a copy of Student Handout #57: "Finance Feedback," and have them complete it as the directions indicate. After each pupil has completed the exercise, divide the class into groups of four or five. Give each group about fifteen minutes to discuss the situation and see if they can agree on the importance of various credit and control careers. Bring the class back together as a whole and review each group's discussion and common conclusions, if any.

3. Divide the class into two groups and explain the directions for "Alphabet Action" in Student Handout #58. Develop the gameboard or set of cards, and play the game as directed.

Individual

1. Provide the student with a copy of Student Handout #56: "Careers in Wholesale Finance." Review the various careers with the student and clarify the role of each person in the finance area of a wholesale business. Have the student select the career title which is of most interest to him and write a short story called, "If I were a . . ."

2. When the student has covered the material in Student Handout #56, give him a copy of Special Activity Sheet #3: "Career Interview." Ask the student to interview three credit managers of three different wholesale businesses in the community. Have him compare the job titles, duties, and benefits of the different situations. Ask him to note situations where workers perform more than one career function.

   When he returns, review the findings he has about credit and control careers. Discuss those careers which he did not find and the duties which those persons performed.

Special Media

1. Films: "Credit" "The Littlest Giant"
2. Filmstrips: "The Exploited Generation"
3. *Career Opportunities: Marketing, Business, and Office Specialists*
4. *Career World Magazines*
5. *Career Briefs,* Careers Publications
6. *Dictionary of Occupational Titles,* Volume I
7. *Encyclopedia of Careers and Vocational Guidance,* Volume I
8. *Finding Your Job Booklets*
9. *Handbook of Job Facts*
10. *Occupational Briefs,* Chronicle Guidance

LEARNING ACTIVITIES

UNIT TITLE *Finance and the Wholesaler* UNIT # *5* OBJECTIVE # *2*

Group

1. Distribute Student Handout #59: "Finance Fish" to groups of three class members. Distribute sheets of cardstock, construction paper, or posterboard to students to make cards. Using the careers in the student handout, have each group make a set of cards. Review the rules of the game and play as directed.

2. After you have covered the information in Student Handout #56: "Finance Fish," make career cards 5" x 7" for each wholesale finance career in the handout. Attach these across the top of the chalkboard or bulletin board in your room.

   Have students develop short phrases pertaining to each of the twelve careers. Perhaps, you might assign each student five career titles and have him submit two phrases for each which depict the activities he performs. A minimum of 60 phrases will be needed, 5 for each job.

   Divide the class into three teams. Select a judge and a moderator. You serve as the timer. Shuffle the phrases that should be on strips of paper or pieces of cardboard. Give them to the moderator. Assign the teams the order in which they will play. Alternate having a player from each team come up to draw a phrase. The student decides under which career card that phrase belongs and tapes it or pins it there.

   The moderator reads the phrase and asks if either team wishes to challenge. If neither team challenges, the judge determines whether it is correct. If it is, his team earns a point. If it is not and he was not challenged, his team's score does not change. However, if he is challenged and that team correctly matches the phrase to the career, then the team loses one point.

   To prevent another team from challenging in every case, a penalty is imposed for incorrect challenging. If a challenger challenges a match which is correct or cannot correctly match the phrase when challenging, that team loses a point. The team drawing the phrase would not lose a point in that case. The team earning the most points in twenty minutes wins the game. Review the career cards and phrases at that time.

Individual

1. Give the learner Student Handout #60: "Financial Horoscope" and have him read the predictions. When he has finished, have him name a wholesale finance career for each horoscope sign and answer the questions at the end of the handout. Discuss his career horoscope matches with him.

2. Read the directions in Special Activity Sheet #8: "Making Mobiles" and obtain the necessary materials for the student. Explain to the student that you want him to create a careers mobile for wholesale finance. Tell him that each piece of the mobile should show the career title and at least one activity performed by that person. A short phrase such as "prepares money trays" is suffient.

   In addition, have the student show the three major career levels in the mobile. Those pieces at the top or to the right might be management/specialist level. Those careers at the bottom or left might be entry level. Display the completed mobile in the room or someplace in the school. Review all of the careers and the activities performed by these credit and control personnel.

Special Media

1. *Occupational Briefs,* Science Research Associates
2. *Occupational Guidance Booklets*
3. *Occupation Guide Series*
4. *Occupational Outlook Handbook*
5. *Occupations and Careers*
6. *Widening Occupational Roles Work Briefs*
7. *Your Future in Retailing*
8. *Your Job in Distribution*

LEARNING ACTIVITIES

UNIT TITLE *Finance and the Wholesaler* UNIT # *5* OBJECTIVE # *3*

Group

1. Prepare a diagram similar to the one in Student Handout #61: "Yeah – Nay Toss." If possible it should be made out of something durable such as plastic. You could construct it on posterboard and cover it with clean contact paper for durability.

   Develop a number of wholesale finance situations in which the teams must decide whether to grant credit according to the 3 C's of credit. Obtain a bean bag from a local variety store or use a substitute, such as a sponge or eraser. Play the game as directed.

2. Provide all class members with a copy of Student Handout #62: Finance Football" and review the rules with the group. Develop the questions for the game, including a number of credit situations in which the students must decide if the applicant is a good credit risk, as well as why he is not if he is not.

   If possible, obtain the five different colored pieces of construction paper or posterboard for the varying difficulties of questions. Play the game as directed.

Individual

1. Give the student a copy of Student Handout #63: "The 3 C's of Credit." Have him read the information and complete the exercises at the end. Review them with him emphasizing the differences between character, capacity, and capital.

2. Provide the learner with Student Handout #64: "Wholesale Credit Customers" and have him complete the exercises as directed. Review application forms with him emphasizing the 3 C's of credit and the careers that would be involved in processing a wholesale credit application.

Special Media

1. *Occupational Briefs,* Chronicle Guidance
2. *Occupational Briefs,* Science Research Associates
3. *Occupational Guidance Booklets,* Finney Company
4. *Occupational Outlook Handbook,* U.S. Department of Labor
5. *Occupations and Careers,* Webster/McGraw-Hill

management: the wholesale way

MANAGEMENT: THE WHOLESALE WAY

Competency

Relate the four major functions of wholesale management to the various marketing situations which occur within a wholesale business.

Objectives

1. Given twenty wholesaling careers, the student will identify the twelve management/specialist careers with 75% accuracy. (knowledge)

2. Given descriptions of ten management/specialist activities, the student will identify the management/specialist career involved in the activity and the management level of that career with 75% accuracy. (comprehension)

3. Given four wholesale management situations, the student will predict which of the four management functions must be performed to handle the situations with 75% accuracy. (application)

Concepts

1. Management is the process of coordinating all resources in order to achieve the goals set by a business or industry.

2. The wholesale manager coordinates all business resources by planning, organizing, directing, and controlling all activities to meet the goals of the business or organization. He assumes much of the risk and standardization functions of the business.

3. The activities which a wholesale manager performs may be grouped into four major functional areas:

   a. *Planning* involves determining what procedures will accomplish the goals set for the business.

   b. *Organizing* includes deciding how the procedures can best be implemented to achieve success for the firm.

   c. *Directing* is the process of leading and guiding personnel within the business to reach the goals of the business.

   d. *Controlling* involves supervision of performance according to the established standards in order to meet the stated goals.

4. Management careers may be classified by one of three career levels:

   a. *Executives* are responsible for decisions coordinating all marketing activities within a business or organization.

   b. *Mid-Management* involves supervision of activities within a specific department or division of a business or industry.

   c. *Specialists* include highly trained, knowledgeable personnel who provide vital information directly to top management of a firm.

5. Some of the wholesale management/specialist careers frequently found include:

Supervisor/Mid-Management

Accounting Manager
Credit Manager
Receiving Supervisor
Purchasing Manager
Route Supervisor
Sales Service Manager
Warehouse Manager
Sales Promotion Director

Specialist

Advertising Man
Sales Engineer
Head Buyer
Marketing Research Analyst
Public Relations Man
Resident Buyer
Sales Promoter
Specialty Buyer

Executive

Comptroller
Company President
General Manager
Merchandise Manager
Operations Manager
Vice-President

6. Marketing risks are the possibilities of financial loss to people or property by unforeseen or uncontrollable factors.

7. The factors which cause marketing risks may be grouped into three main categories or classes:
    a. Market conditions – changes in prices, consumer demand, competition
    b. Human factors – uncertain acts of dishonesty, illness, carelessness
    c. Natural perils – fire, disease, earthquakes, coldness, hurricanes

8. Two methods of minimizing marketing risks help to reduce the chances of financial losses to businesses, as well as to individuals:
    a. Good management practices – planning and implementing safety practices
    b. Shift of losses to others – purchasing insurance to cover losses

   It is through these two methods of reducing financial losses that many wholesale management activities take place.

Equipment

1. Overhead projector, 16mm film projector
2. Tape recorder, video tape recorder, record player

Materials

1. Films: "Management Improvement – It's Your Business"
   "Is a Career in Business Administration for You?"
   "Is a Career in Management for You?"
2. Filmstrips: "Careers in Business Administration"
3. Pamphlets: *Career Opportunities in Wholesaling,* NAW
   Your Career in Wholesale Distribution, NAW
   Your Opportunity in Wholesale Distribution, NAW

4. *Career Opportunities: Marketing, Business, and Office Specialists*
5. *Dictionary of Occupational Titles,* Volume I
6. *Encyclopedia of Careers and Vocational Guidance,* Volume I
7. *Handbook of Job Facts,* Science Research Associates
8. *How Do They Run It?,* Westminster Press
9. *Occupational Briefs,* Science Research Associates
10. *Occupational Outlook Handbook,* Finney Company
11. *Occupational Outlook Handbook,* U.S. Department of Labor
12. *Widening Occupational Roles Work Briefs,* Science Research Associates

Supplies

1. Cassette or reel tapes, video tape, glue, tape, scissors
2. Construction paper, posterboard, white paper, felt tip pens

Special Resources

1. Student Handouts # 65-73
2. Commercial Games: "Billionaire," Parker Brothers
   "Boss," Ideal Toy Corporation
   "Junior Executive," Whitman Company

THE WHOLESALE MANAGEMENT SCENE – KEY

1. These twelve wholesale management careers should have had an "X" in the blank next to their titles:

Warehouse Manager
Sales Engineer
Vice-President, Sales
Head Buyer
Credit Manager
Advertising Man
Operations Manager
Purchasing
Sales Manager
Sales-Service Supervisor
Comptroller
Marketing Research Analyst

The student will satisfy objective #1 when he correctly identifies 9 of the careers for 75% accuracy.

2. The wholesale management careers and their management levels are:

CAREERS	LEVELS	CAREERS	LEVELS
a. Marketing Research Analyst	S	f. Warehouse Manager	M
b. Merchandise Manager	E	g. Sales Engineer	S
c. Sales Promotion Director	M	h. Sales Manager	M
d. Company President	E	i. Comptroller	E
e. Sales-Service Supervisor	M	j. Purchasing Manager	S

If the student scores 15 out of 20 for 75% accuracy, he has demonstrated proficiency for objective #2.

3. These management functions should have been identified for the wholesale management situations:

a. Planning
b. Organizing
c. Directing
d. Controlling

The student will achieve objective #3 if he answers 3 of the 4 situations correctly for 75% accuracy.

THE WHOLESALE MANAGEMENT SURVEY – KEY

1. The twelve wholesale management careers which should have been circled are:

OPERATIONS MANAGER	RESIDENT BUYER
SALES MANAGER	GENERAL MANAGER
SALES PROMOTION	ADVERTISING MAN
SPECIALTY BUYER	ROUTE SUPERVISOR
COMPTROLLER	SALES-SERVICE SUPERVISOR
MARKETING RESEARCH ANALYST	MERCHANDISE MANAGER

The student will have demonstrated sufficient knowledge for objective #1 if he correctly identified 9 of the careers for 75% accuracy.

2. The following wholesale management/specialist careers and levels should have been identified for the given retailing activities:

CAREER	LEVEL	CAREER	LEVEL
a. General Manager	Executive	f. Sales Service Supervisor	Supervisor
b. Advertising Man	Specialist	g. Company President	Executive
c. Specialty Buyer	Specialist	h. Public Relations Man	Specialist
d. Comptroller	Executive	i. Credit Manager	Supervisor
e. Marketing Research Analyst	Specialist	j. Merchandise Manager	Executive

If the student correctly answers 15 of the items for 75% accuracy, he will have achieved objective #2.

3. The following management functions were involved in the situations:

a. Planning	c. Directing
b. Organizing	d. Controlling

Three correct answers for 75% accuracy will satisfy objective #3.

LEARNING ACTIVITIES

UNIT TITLE *Management: The Wholesale Way* UNIT # *6* OBJECTIVE # *1*

Group

1. Develop a personality profile for twenty-five of the wholesale management careers. You may want to have the students submit some examples. The day before, give each student a copy of a career profile. Ask them to review the personality information for class the next day.

   Divide the class into two teams, excluding a moderator. Supply each team with a bell, buzzer, or noisemaker. Give each of the career personalities a number from 1-25, so that each of them has a different number. Inform the moderator that he will introduce each personality, one at a time, beginning with number 1.

   Each team will alternate asking one question of the personality. The team has thirty seconds in which to pose the question. Players on a team should be identified in order, so that each may ask a question. If any player at any time thinks he knows the answer, he may ring the bell or buzzer. When the moderator acknowledges him, that player may guess the career.

   If the player is correct, his team earns a point. However, if his answer is not correct, his team loses a point. If he is incorrect, the other team may continue with questions or guess the career title. In this case, an incorrect guess would not involve a penalty point. Each team has up to ten chances or questions to reveal the identity of the mystery wholesale management career personality.

2. Provide each student with Student Handout #65: "Wholesale Jeopardy" or explain the directions. Have the students prepare questions that include the career levels of the wholesale careers. Play the game activity as directed. Use the five categories of buying, selling, warehousing, finance, and management.

3. Ask the students to take out a piece of scratch paper to jot down their ideas. Explain that the group is going to share their ideas and opinions, that there are not right or wrong answers. Papers will not be graded; they are for their use.

   Ask students to pretend that they are "slipping into someone else's shoes." In this case, the shoes will be people in wholesale management careers. Tell the students to complete each of the following statements with their opinions or reactions:

   If I were a sales manager, you wouldn't catch me . . .

   As a merchandise manager, I'd be against . . .

   I'm convinced that an advertising man . . .

   In my opinion, a purchasing manager is . . .

   The way I see it, a company president should . . .

   If you ask me, the warehouse manager is . . .

   If I were a sales-service supervisor, I'd feel that . . .

   As a wholesale comptroller, my choice would be . . .

   I believe that a marketing research analyst . . .

I don't see why a sales promotion director . . .

I think if I were a general manager, I'd . . .

State only one line at a time. Have students jot down their reactions or opinions within one minute. Then ask students to pass their slips forward. Read some of the responses to the group. Discuss with the students how they thought of the career involved. Ask them if they had a picture in their minds of what the person looked like doing the job. Review the responsibilities of the specific career and its management level. Repeat the same procedure for each of the statements listed above.

Individual

1. Give the student a copy of Student Handout #66: "Management – The Wholesale Way". When he has finished reviewing the material, discuss the wholesaling management careers that have been covered in previous units, making sure you include some from each unit.

   Have the student complete the exercise at the end of the reading material and review his responses with him.

2. Provide the learner with a copy of Student Handout #67: "Wholesale Management Decisions." Ask the student to place the "X" along the continuum line that is drawn to show how he would feel or act in the given situations.

   Discuss each of the situations with the student. Did he understand the situations involved? How did he view each one? Did he read information into them? Did his answers depend on other information he supplied? Did he recognize the management career personnel in the situations? Review each of the careers with him, emphasizing the responsibilities of each. Ask him what other management careers can be found in wholesale businesses.

3. Give the learner a copy of Student Handout #68: "Dial Management" and have him complete the puzzle as directed. Review the management careers in wholesaling with him and ask him to explain what he thinks the roles and responsibilities of each of them is.

Special Media

1. Films: "Management Improvement – It's Your Business"
   "Is a Career in Business Administration for You?"
   "Is a Career in Management for You?"
2. Filmstrips: "Careers in Business Administration"
3. Pamphlets: *Career Opportunities in Wholesaling*, NAW
   Your Career in Wholesale Distribution, NAW
   Your Opportunity in Wholesale Distribution, NAW
4. *Career Opportunities: Marketing, Business, and Office Specialists*
5. *Dictionary of Occupational Titles*, Volume I
6. *Encyclopedia of Careers and Vocational Guidance*, Volume I
7. *Handbook of Job Facts*, Science Research Associates
8. *How Do They Run It?*, Westminster Press
9. *Occupational Briefs*, Science Research Associates
10. *Occupational Guidance Booklets*, Finney Company
11. *Occupational Outlook Handbook*, U.S. Department of Labor
12. *Widening Occupational Roles Work Briefs*, Science Research Associates

LEARNING ACTIVITIES

UNIT TITLE *Management: The Wholesale Way* UNIT # *6* OBJECTIVE # *2*

Group

1. Divide the class into groups of four to six students. Give each student the first sheet of Student Handout #69: "Management Bonus." After the students have read the information, discuss the situation with them. Ask each student to identify the management level of each career before they begin so they will have a clearer picture of each person's role in the business.

   Give each group twenty minutes to come to a decision. Have each group report to the rest of the class on their group's selections. After each group has finished its report, give each student the second sheet of the handout and ask them to react to the questions in writing.

   Discuss with the group other wholesale management careers and levels that could have been involved in other businesses. Ask students what general criteria they would use in each similar situation to make a decision.

2. Divide the class into groups of four. Give each group a copy of Student Handout No. 66 for review. Then distribute a copy of Student Handout No. 67 to each group for classification of the career titles under the appropriate level. The first group to complete the task with the highest score will serve as judges for the second part of the activity.

   The group of judges will write job descriptions in the form of work situations, on index cards for each of the job titles in Student Handout No. 67. The judges will read the description to the other groups. The first group to identify the correct job title and management level classification wins 5 points. The group which reaches 25 points first wins the game.

Individual

1. After the student has covered the information in Student Handout #66: "Management – The Wholesale Way," ask him to select three management careers of interest to him, one for each of the management levels – mid-management/supervisor, specialist, and executive. Provide him with copies of the Special Activities Sheets #1: "Career Decision" and #9: "Personal Career Analysis." He will need three copies of the "Personal Career Analysis" sheets, one for each career.

   When he completes his research and analysis, talk to the student about his reactions. Discuss the career ladders he might take to reach one of those management careers. Review other retail management careers, their job activities, and their management levels.

2. Give the learner a copy of Student Handout #67: "Classifying Management Careers." Explain to the student that the given wholesale management careers vary in types of responsibilities as indicated by the three management levels. Ask him to check the appropriate column for each of the careers to show its management level and review his answers with him.

Special Media

1. Films: "Management Improvement – It's Your Business"
   "Is a Career in Business Administration for You?"
   "Is a Career in Management for You?"
2. Filmstrips: "Careers in Business Administration"
3. Pamphlets: *Career Opportunities in Wholesaling*, NAW
   Your Career in Wholesale Distribution, NAW
   Your Opportunity in Wholesale Distribution, NAW
4. *Career Opportunities: Marketing, Business, and Office Specialists*
5. *Dictionary of Occupational Titles*, Volume I
6. *Encyclopedia of Careers and Vocational Guidance*, Volume I
7. *Handbook of Job Facts*, Science Research Associates
8. *How Do They Run It?*, Westminster Press

LEARNING ACTIVITIES

UNIT TITLE *Management: The Wholesale Way* UNIT # *6* OBJECTIVE # *3*

Group

1. After the students have covered the information in Student Handout #71: "Functions of Wholesale Managers," give each student a copy of the Student Handout #72: "Management Baseball." Have each student prepare questions on wholesale careers, businesses, activities, and management functions. Include some questions which are short cases that students must study and predict the management function to be used. Play the game activity as directed.

2. Divide the class into four groups. Each group will represent one of the following areas in wholesaling: buying, selling, warehousing, and finance. Have each group develop a one act play about management functions in their area. Each play should cover all four management functions of planning, organizing, directing, and controlling.

   If possible, obtain a video tape recorder on which the students may present their presentation. This will allow you an opportunity to stop it at various points for discussion, as well as build a resource file for later use. If you cannot obtain a video tape recorder, have each group enact the play "live" for the class audience.

3. Review the material in Student Handout #73: "Wholesale Simulation Game." Distribute the necessary pages to students according to the roles they assume. With a larger class, you may wish to add roles, such as an industrial customer, an insurance broker, a government inspector. Have the students participate as directed.

Individual

1. Give the learner Student Handout #71: "Functions of Wholesale Managers." Have him read the material and complete the statements at the end. When he is finished, discuss the four functions with him giving him examples of each in different situations.

   Provide the pupil with three copies of the Special Activity Sheet #4: "Career Questionnaire" and have him survey three wholesale managers in the community. Ask him to select one manager in each of the three management levels from three different businesses.

   Aside from the information requested, ask the student to ask the managers how they perform the four management functions of planning, organizing, directing, and controlling. Call the businessmen ahead of time to explain the purpose of the student's visit and to schedule a convenient time for the student to come.

2. Have the student select the wholesaling area that is of most interest to him, whether it be an activity such as buying or a business such as a merchant wholesaler. Ask him to develop a career manual on the job progression from career entry to management in that area. Ask him to include the career titles, job descriptions, activities performed, and requirements necessary for each career in the job progression. In this career manual, he should include the management career opportunities and the four major functions performed by each, giving specific examples for each career.

Special Media

1. *Occupational Briefs,* Science Research Associates
2. *Occupational Guidance Booklets,* Finney Company
3. *Occupational Outlook Handbook*, U.S. Department of Labor
4. *Widening Occupational Roles Work Briefs,* Science Research Associates

SPECIAL ACTIVITIES

SCHOOL BUS
SHOP

CAREER DECISION

Choosing a career which will give you job satisfaction for the rest of your life may well be the most important decision you will ever make. You must make this decision carefully and wisely. You will find almost limitless job opportunities in the field of marketing.

Most young people entering the labor market today will change jobs from three to twelve times during their lifetimes. There are many reasons why workers change jobs; personality problems, health, financial, improper training, job obsolescence, work adjustment, advancement, and in many cases a poor career choice by the worker.

To make the right career decision, you must match your interests, aptitudes, values, and personal qualities with an occupation needing your abilities and rewarding your interests. Select three careers in which you think you might be interested. Check the *Dictionary of Occupational Titles, Encyclopedia of Careers and Vocational Guidance*, the *Occupational Outlook Handbook*, *Handbook of Job Facts*, and other career information sources that are available to you. Investigate each career thoroughly and choose the one which seems to match your talents, values, and interests, as well as provide a challenging, interesting, and satisfying career. Remember that this decision must satisfy your long-term goals.

First career choice ______________________________

Second career choice ______________________________

Third career choice ______________________________

CAREER EXPLORATION CHART

Career Title____________________ Age________ Sex________

Educational Qualifications____________________

Career Experience Required____________________

Personality Traits Necessary____________________

Physical/Health Requirements____________________

Special Requirements____________________

Working Conditions____________________

Occupational Rewards____________________

Advancement Opportunities____________________

Occupational Outlook____________________

Occupational Tasks Performed____________________

CAREER INTERVIEW

Student's Name:______________________________ Date:________________

Name of person interviewed:__________________________ Business:________________

Questions to be asked by person conducting the interview:

1. What is your career title?______________________________
2. What tasks do you perform on your job?______________________________
3. What educational training and occupational experience is needed?______________________________
4. What personality traits are most important in your field?______________________________
5. What skills and knowledge are required in this occupation?______________________________
6. How would you describe the working conditions of your job?______________________________
7. Could you tell me the approximate starting salary of workers in your occupation?______________________________
8. What are some of the fringe benefits and rewards offered by your company?______________________________
9. What do you consider the major advantages of your career?______________________________
10. What are the major disadvantages of your occupation?______________________________
11. What are the advancement opportunities in your occupation?______________________________
12. Is the employment outlook in the future good for this career?______________________________

SPECIAL ACTIVITIES 4

CAREER QUESTIONNAIRE

1. Name: ____________________ 2. Employer: ____________________

3. Job Title: ____________________ 4. Address: ____________________

5. Job Duties: ____

6. How did you get your job or the job leading to it?

_______ Public employment office
_______ Private employment office
_______ Friends and relatives
_______ Newspaper want ads
_______ DE Coordinator
_______ Personal application

7. What type of training did you receive before going to work full-time?

_______ Less than high school
_______ High school
_______ Vocational school
_______ Junior college (2 years)
_______ Senior college (4 years)
_______ On-the-job training

8. Did your employer provide a training period?

_______ Yes _______ No How Long? ____________________

9. How well did your school subjects prepare you for your job?

_______ Very great
_______ Good
_______ Moderate
_______ Very little

10. What type of grades did you make in high school?

_______ Above average _______ Average _______ Below average

11. Which high school subjects do you feel best prepared you for your job?

____

12. What high school subjects were least helpful in preparing you for your job?

____

13. How do you like your job?

_______ Like it very well
_______ Like it fairly well
_______ Dislike it somewhat
_______ Dislike it a great deal

14. What aspects of your job do you like the most?

____

15. What aspects of your job do you dislike the most?

____

16. Would you be willing to visit our Career Exploration class and answer questions about your career?

____

CAREER SPEAKER

Resource persons from the local business community should be invited to talk about their careers to students. An effort should be made to invite workers from all career levels and types of businesses.

Many potential speakers decline invitations to appear before classes because they dislike preparing and making speeches. They may be more likely to respond if the teacher discourages them from making formal speeches bur simply asks them to be prepared to discuss their job responsibilities and answer the questions of students.

Prior to the speaker's visit students should:
- Learn as much as possible about the speaker's occupation.
- Try to gather information about the business for which the speaker works.
- Be prepared to ask the speaker pertinent questions.

Tape recordings should be made of visits by resource persons and filed for later use. These tapes may be played for other classes later in the day, if the speaker can stay for only one class meeting. Students who are absent may also profit from hearing the tape. In addition, a career file for other terms can be developed.

During the next class meeting, students should discuss the points covered by the speaker and consider their own suitability for the occupation represented by the speaker.

Many times local organizations such as Sales and Marketing Executives, Rotary, Kiwanis, and Chamber of Commerce may be willing to establish a speaker's committee responsible for furnishing resource persons for career exploration classes. Although many people who belong to these organizations hold managerial/professional jobs, most of them are willing to release their employees for classroom visits.

CAREER SURVEY

1. Name of firm:____________________ 2. Type of business:____________________

3. Number of employees:____________________ 4. Person surveyed:____________________

5. Please identify the types of jobs found in your business.

____

6. Is part time or summer employment available for high school students?

____

7. What fringe benefits such as vacations, insurance, retirement, etc., are offered?

____

8. What type of education or special training is required for securing a job with your organization?

____

9. What tests or licenses are needed in your business?

____

10. What qualities do you look for in considering a person for employment?

____

11. Would you or a representative of your business be willing to participate in a Career Day program or speak to our class about your firm?

____

12. What is the future occupational outlook for careers in this business?

____

SPECIAL ACTIVITIES **7**

CAREER TRIP

A field trip or tour is a carefully arranged event in which a group visits an object or place of interest for first-hand observation and study. The trip can range from a short visit to a single location to one lasting several days and covering several states.

Plant tours give the students an opportunity to see, hear, feel, and smell the environment in which they might work. Naturally, the teacher must make arrangements with the principal for transportation and released time for students. In some school systems insurance and parental approval forms are required for students making tours. Trips, even in small communities, may be scheduled to places of employment such as department stores, mail-order houses, service stations, supermarkets, and automatic vending companies.

In selecting businesses, it may be wise to visit places where former students are employed. Students should be encouraged to concentrate on the functions that workers actually perform as well as the process. Interesting discussions in class meetings after the trip may be initiated to determine what the students liked or disliked about the various jobs.

The Field Trip Should be Used:

1. To provide the first-hand study of careers and activities that cannot be easily brought to the learning group.
2. To stimulate interest about marketing careers.
3. To illustrate the examples of marketing careers and activities in their natural business environment.
4. To relate classroom study to practical business situations.

Some Advantages Of A Field Trip Include:

1. Seeing careers in action is usually more meaningful than hearing or reading about them.
2. The careers can be seen in relation to each other within the business setting.
3. The trip usually has a high motivational value for the participants.

Although some teachers feel that they are inconveniencing those in industry and business by requesting permission to tour their facilities, most businessmen are themselves parents and are usually happy to have students visit their places of business.

Arrangements might be made for students to tour nearby colleges and vocational schools. Junior high students may benefit from touring the local Vocational-Technical Center or high schools which offer Distributive Education career programs. If possible, let students talk to high school or community college students who are enrolled in Distributive Education training programs.

CAREER TRIP REPORT

Name: ______________________________ Date of Field Trip: ______________

Place visited: ____

List some of the occupations which you observed:

______________________ ______________________
______________________ ______________________
______________________ ______________________
______________________ ______________________

List specific activities in which persons in each of these occupations were engaged:

______________________ ______________________
______________________ ______________________
______________________ ______________________
______________________ ______________________

List skills which are required for workers in these occupations:

______________________ ______________________
______________________ ______________________
______________________ ______________________
______________________ ______________________

What education, training and career experience is needed in these jobs?

______________________ ______________________
______________________ ______________________
______________________ ______________________
______________________ ______________________

Which of the jobs or activities observed did you find most interesting?

______________________ ______________________
______________________ ______________________

Which of the jobs or activities observed did you find least interesting?

______________________ ______________________
______________________ ______________________

Did the workers seem to enjoy their job?

____

Would you recommend this career trip to other students? Why or why not?

____
____

MAKING MOBILES*

A colorful flutter of shapes and styles, mobiles are an interesting, fun method that can be used most effectively to introduce, emphasize, and reinforce significant terms which you want your students to remember. Whether you want to stress the basic steps in selling, the major functions in marketing, or the kinds of customer services – a bright, floating mobile cluster is just the approach to use for your "daydreamer" or "sleeper" student.

Time, as always, is an important factor to consider. Alternatives to creating an original mobile are available for those of you who are not artistically inclined nor have the time to spare. First, a variety of plastic or paper mobiles can be located in many novelty stores or departments ranging in price from $1.00 - $3.00. The shapes of an individual mobile's pieces may be traced onto construction paper, posterboard, or cardstock. The desired terms, illustrations, phrases, etc. can then be depicted on each outlined piece.

After each shape has been cut out, glue or tape it to the purchased mobile. Since most of the manufactured cluster mobiles are multicolored, the message or illustration on the solid colored paper is easier to read, as well as a contrast to watch as the mobile floats. A variety of different solid colors which blend with those colors in the purchased mobile is usually the most effective choice, the messages in red or black seem to attract more attention.

Another alternative for the economy-minded folks is to purchase mobile paperback books. These booklets are currently available in many variety and drug stores, including Eckerd's Drug Stores, McCrory's, and Woolworth's at price ranges of $.39 - $.99. One of the better buys presently available is "Bright Butterflies" priced at $.39 published by Whitman Co. This particular booklet contains a total of 36 pieces with instructions for assembling the sections. All or part of them may be used as is or with a backing as was described in the above paragraph. Usually, four to eight pieces in a mobile cluster are most effective in achieving your educational aim or purpose.

In assembling a mobile, many types of string may be used. Kite string or nylon fishing line are often used. Magic markers can be employed to make the line more attractive. Ordinary knitting yarn or sewing thread make an excellent finishing touch to your project. Solid colors or multicolored yarn may be purchased at almost any variety, department, or fabric store for $.39 - $.59 to make approximately ten mobile clusters, depending upon their size.

Support wire for the mobile may consist of floristry wire, chicken wire, or coat hangers. Generally, floristry wire can be purchased from a local florist for 2¢ - 3¢ per foot.

Making mobiles can be an interesting learning activity for students. Why not let each of them create a mobile for some unit. Terms and illustrations involved will reinforce information to the individual student as well as to other classmates when they are hung in the room.

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PERSONAL CAREER ANALYSIS

Analyze your career using the following questions as guidelines. Reflect your views for each of them on the lines provided.

1. Age: How old must I be to enter the occupation?

   ____

2. Sex: Is this an occupation in which others of my sex are normally employed? If not, is that important to me?

   ____

3. Do I have the necessary physical or health requirements? Can I get them?

   ____

4. What personality traits do I have that would help me in this career?

   ____

5. How could I enter this occupation – education, experience, personal qualities, special requirements? Am I willing to obtain them?

   ____

6. What subjects in school would help me most to prepare for this career?

   ____

7. What are the local opportunities for this job? Am I likely to find a job opening in small towns as well as cities?

   ____

8. Interest: Do I possess this interest? If not, could I develop interest in this type of work?

   ____

9. Values and Attitudes: Does anything about this job violate values and attitudes I have about people and work? If so, could I adjust to situations that required that I change my values and attitudes?

   ____

10. Would I be happy doing this kind of work? Why or why not?

    ____

SPECIAL ACTIVITIES **10**

PERSONALITY OF THE DAY PROJECT*

Purpose

Attached is a personality questionnaire that can be used to achieve several objectives.

> It provides you and other students with a better knowledge and understanding of the students in the class.
>
> It gives you information for final reports.
>
> It aids the expression of the individual's personality.
>
> So many students know very little about each other and are acquainted with their own select group. Oftentimes they do not even know their classmates full names.

Preparation

Have each student bring a picture of himself to class. It may be either a school picture or a snapshot.

Have each student fill out the personality questionnaire. Collect the questionnaires and attach the pictures to them.

Review the questionnaires and decide the order in which you will present students according to their responses.

Procedure

Allow a couple of minutes at the beginning of each period to introduce the "Personality of the Day." Begin by telling the class something about the person without revealing his name. Be selective in your information so as not to embarrass the student. Keep in line with such statements as, "This personality would like to be a fashion buyer and really likes working with people," or "This person says he is afraid of snakes and the dark."

Then let the students try to identify the person. Follow this with a BIG introduction, announce the student's name, and reveal his picture (tacked on a poster behind a portable screen or whatever method you devise). Applaud the person and have him or her sit in the "Honored Chair or Desk." You will find the first few students to be shy and embarrassed to have their pictures on display. You can overcome this by praising the person and complimenting the picture and keep right on moving to the next part of the day so as not to lag after the introduction.

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PERSONALITY QUESTIONNAIRE*

Complete the following sentences about yourself and your particular personality. Be certain that you write in complete sentences.

1. I would like to be a ______________________________

____

2. I feel proud when ______________________________

____

3. The future looks ______________________________

____

4. I wish my parents ______________________________

____

5. To me school ______________________________

____

6. People think I ______________________________

____

7. On weekends I ______________________________

____

8. I hope I'll never ______________________________

____

9. I wish people wouldn't ______________________________

____

10. When I finish school ______________________________

____

11. I'm afraid of ______________________________

____

12. Comic books are ______________________________

____

13. When I take my report card home ______________________________

____

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14. I am at my best when ______________________

15. Most brothers and sisters ______________________

16. I don't know how to ______________________

17. I often worry ______________________

18. I wish I could ______________________

19. I look forward to ______________________

20. I wish ______________________

21. My age is ______________________

22. My address is ______________________

23. I will be a success if ______________________

24. My best quality is ______________________

25. If I worked in retailing ______________________

THE WHOLESALER

This course is about the creation of a model wholesaler in miniature right in the classroom. "The Wholesaler" should be built by the students as they progress through the course. The following recommendations are given for your consideration.

1. Conduct a field trip to a large wholesaler at the very beginning of the course. Assign each student a major activity and job to observe while on the tour. A list of prepared questions for which each student would seek answers would be helpful. While on the tour, take a complete set of color slides which can be used for review purposes throughout the course.
2. In constructing the wholesaler, use large corrugated cardboard cartons; e.g., refrigerator, range or appliance boxes.
3. Use one box for each department as you progress through the course.
4. Encourage the students to plan the physical facility for each department, including activities performed, facilities required, jobs performed and materials needed.
5. Encourage the students to use ingenuity in using "odds and ends" in furnishing each department.
6. Use "paper dolls" or similar contrivances to represent workers in each department.
7. Put it all together after studying each department with students role-playing pre-employment and employment situations.
8. Explode the wholesaler into full-size operation by having each student assume the identity of one of the employees studied.
9. Bring in as much realism and detail as possible and practicable.

WHOLESALING*

Group Research Project

1. To supplement the instruction of wholesaling, students will be required to gather information on a selected wholesaling topic. The project will be assembled and tabbed using a notebook or similar means.

2. The notebook should contain as a minimum the following:

   a. A detailed listing of all the jobs which are found in your wholesaling topic.

   b. A detailed listing of the services provided by your wholesaling area.

   c. If desired, you may prepare a collage depicting pictures concerning your topic.

   d. A list of want ads from the newspaper relating to jobs found in your wholesaling area.

   e. News articles, magazine articles, pictures, drawings, and other type material related to your topic.

   f. Information material, brochures, and forms pertaining to your topic that you may have obtained from a personal visit to a local wholesaler.

   g. Any other materials that will add information about your topic.

3. Where to get information and materials for your project:

   a. School or community library.

   b. Newspapers, magazines, trade journals.

   c. Personal visit to a wholesaler.

4. Your project will be graded based on the quality and amount of pertinent material you have collected, originality, neatness and arrangement. The grade assigned to a project will also be assigned to each member of the group.

5. Be creative and use your imagination. The guidelines for this project need not be strictly followed if you think you can come up with some better ideas. Plan how and what you are going to do and you will be pleasantly surprised by what can be accomplished if the members of the group all work together.

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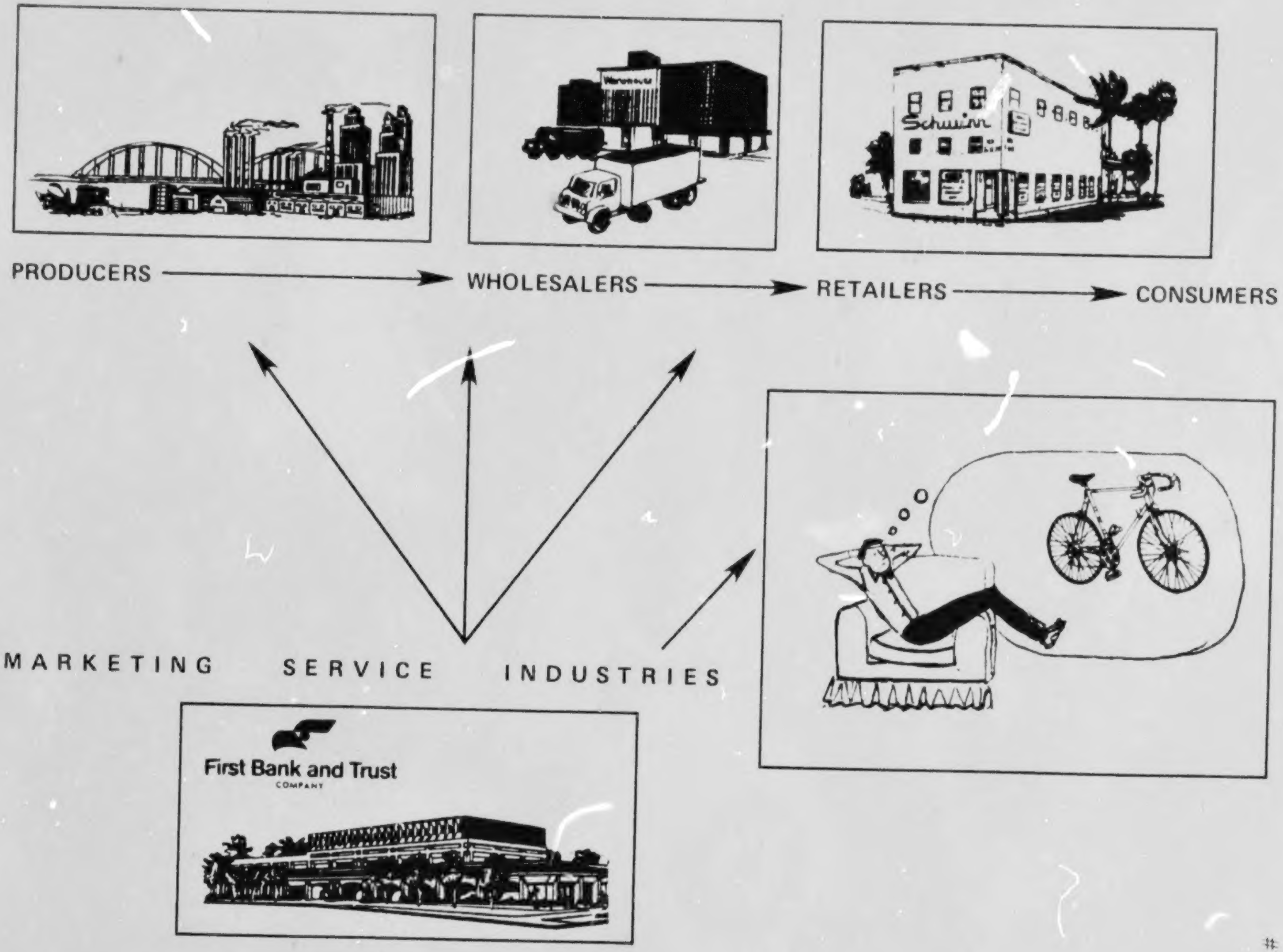
STUDENTS MATERIALS SECTION

DISPLAY
SHOWROOM

student handouts

CHANNELS OF DISTRIBUTION: HOW WE GET OUR GOODS


Warehouse
Schwinn
First Bank and Trust
COMPANY

PRODUCERS → WHOLESALERS → RETAILERS → CONSUMERS

MARKETING SERVICE INDUSTRIES

#1

COMPONENTS IN THE CHANNELS OF DISTRIBUTION #2

Marty slipped into his car seat and cranked the engine. As he drove down the main street, he gazed into the store windows. He had been looking for a new suit to wear when he went applying for a job next week. Marty had decided that he wanted a career in marketing. As a consumer, he had been in the habit of buying goods and services for his use, not for resale. Now, he wanted to pursue a career in marketing.

Marketing. That's a heavy sounding word, he thought. But it's not hard to understand. Marketing involves all the activities necessary in getting or distributing goods and services to consumers or businesses. It is concerned with buying the materials, machinery, and manpower needed for production or operation, but not with the actual production or processing of a product. It includes product planning and research, as well as all the activities necessary to get the goods from the producer to the consumer.

Marty turned on the radio and listened to his favorite rock station. Gee, he thought, I really don't know whether I want to work for a producer, a wholesaler, a retailer, or a marketing service industry. He laughed to himself. A year ago, he didn't even know what those words meant. He turned onto the interstate and settled back for his hour drive thinking about the different kinds of businesses in which he could launch his marketing career.

Producers (Manufacturers, Converters, Farmers, Miners, etc.)

All goods must first be produced. Vegetables, fruits, and meats must be grown on a farm. Many foods must be processed in a cannery. Clothes that we wear have to be made in a factory. Our cars and bicycles have to be manufactured using an assembly line. Oil wells are drilled: refineries convert it into the gasoline and fuel oil we need. Coal is extracted or taken out of mines to provide heat and energy. There are all kinds of opportunities with producers.

It's not always practical to get the things we want or need directly from the producer, Marty said to himself. Consumers obtain products in one of many ways. If a person can't buy goods directly from the producer, he usually buys them from a local retail store. The retailer may buy those goods, such as the clothing items, directly from the factory, or producer. Sometimes, he may get them from a wholesaler. The wholesaler provides fast delivery and many services to all kinds of businesses, but especially to smaller retail stores. Marketing service industries provide services to all businesses, as well as to consumers.

Some or all of these businesses can be involved in getting the goods from the original producer to the consumer. All the different paths that can be used are called the channels of distribution. Gee, Marty thought, I've got to review all I know about wholesalers, retailers, and marketing service industries so I can decide where I want to apply for a job.

Wholesale Businesses

Wholesalers buy from manufacturers or other wholesalers, and mostly resell their merchandise to the retailers. They must determine what the retailers want to buy and study the products which the manufacturers have to sell in order to satisfy the retailers' demands and make a profit. Sometimes a representative acts for several manufacturers or wholesalers in selling goods and is called an agent. There are many different types of wholesalers—some carry a wide variety of merchandise, while others carry only a limited line of merchandise. Examples of wholesalers include:

General Wholesaler
Petroleum Jobber
Automobile Parts Distributor
Food Broker
Drug Wholesaler
Building Supply Wholesaler

Look in your local telephone directory. How many different types of wholesalers are loctated in your community? What type(s) of product(s) do they carry? What kinds of businesses do they service?

Retail Stores

Retail stores buy their merchandise from the wholesalers or from the manufacturers or both, and resell them to the ultimate consumer, namely you. Department stores, such as Sears, Penney's, and Ward's are quite large and carry a wide variety of merchandise. Other retail stores carry a particular line of merchandise such as:

1. Apparel and Accessories
2. Automotive Parts
3. Groceries and related items
4. Hardware and Building Materials
5. Home Furnishings
6. Petroleum Products
7. Farm and Garden Supplies
8. Musical Equipment

Think about your home town for a moment. Can you identify a large department store that carries a wide variety of merchandise? Can you identify a store in your town for each of the products given above?

Marketing Service Industries

Marketing service industries provide a service either to the consumer, namely you, or to another business. The services they provide to you may help to make your life more pleasant, more enjoyable, or more secure. The services which they provide to another business enables that business to carry on its operations and, therefore, meet the demands for its products and/or services. Examples of marketing service industries include such businesses as:

1. Advertising Agencies
2. Banks and Finance Companies
3. Movie Theatres
4. Stock Exchanges
5. Restaurants and Hotels
6. Newspapers and Publishers
7. Insurance Companies
8. Real Estate Agencies
9. Travel Agencies
10. Transportation Companies

Again, think about your home town for a moment. What types of marketing service industries are located in your community? What types of services do each of these institutions provide?

Marty muttered to himself, "Wow, this really blows my mind." There are so many different types of marketing businesses in which I could work. Let me see if I can briefly cover the main points I just reviewed.

Marketing Review

1. The business which grows, harvests, processes, or manufactures a product is known as the ______________.

2. The business which sells goods directly to the consumer is the ______________.

3. The business which sells services to other businesses as well as to the consumer is the ____________ ____________ ______________.

4. The business which serves as a middleman between the manufacturer and the store where a customer buys it is the ______________.

5. A person who buys a product from a store for his own use is a ______________.

6. The flow of goods from the producer to the consumer occurs in the ____________ ______________ ______________.

7. A businessman who may represent more than one manufacturer or wholesaler in selling to the retailer is known as an ______________.

8. Draw three channels of distribution using P for Producer, W for Wholesaler, R. for Retailer, C for Consumer, and S for Marketing Services. Draw arrows between the letters to show the flow of goods from one component to another, beginning with the producer and ending with the consumer. Three blanks are provided for each of the channels. An example might be: P– R– W– C.

______________________ ______________________ ______________________

9. The Channel which is most frequently used is: ________________.

10. All of the activities involved in acquiring and distributing goods or services to businesses or consumers is called __________.

MARKETING MATCH

#3

Participants

1 Emcee & Judge

2 Players

1 Scorekeeper

Directions

This game activity may be used to introduce marketing functions, as well as to reinforce or review the eight basic marketing activities and the coordinating element of management. For understanding of the terms and reinforcement purposes, the students should explain the terms as described herein. Develop cards with each of the following terms written on one side of them, so that you have two cards for each term or a total of twenty cards. On the back of each card, place a number from 1–20 so that each card has a different number. Alternate the numbers on the cards so that there is no special pattern relating to the marketing functions and management.

Place the cards on a table with the numbers facing up so that there are four rows of five cards with 1–5 on the first row, 6–10 on the second row, etc. Have the two players or teams flip a coin to determine who shall begin the game. A student will select two numbers. When he has two identical terms, he must give the explanation or definition of the term to win a point for himself or his team. A simple match of the two identical terms does not earn a point. The exception applies if a student picks a free match card and a term; he does not have to give the definition and receives a complimentary point. The game is won by the person or team receiving the most number of points.

Make two cards each of the following terms to form one set:

MARKET RESEARCH (MR)
BUYING (BU)
STORAGE (ST)
RISK (RI)
MANAGEMENT (MG)
STANDARDIZATION (SN)
SELLING (SE)
TRANSPORTATION (TR)
FINANCE (FI)
FREE MATCH (FM)

It is suggested that a teacher have several sets made up so that the terms are in different orders and can be used on a rotation basis. A runoff could be played with the top scorers in the class if the entire class has been involved in playing the game.

Sample Gameboard

1	2	3	4	5	MR	BU	ST	RI	MG
6	7	8	9	10	FM	FI	TR	SE	SN
11	12	13	14	15	MG	SN	RI	ST	MR
16	17	18	19	20	BU	TR	FI	SE	FM

If the gameboard is to be used by two teams, a bulletin or pegboard may be employed. Pieces of construction paper arranged on the board and held by hooks or thumbtacks would allow easier viewing for larger numbers of students.

MARKETING RESEARCH	FINANCE	STANDARDIZING	SELLING	BUYING
MANAGEMENT	RISK	TRANSPORTING	STORAGE	FREE MATCH
STANDARDIZING	SELLING	MARKETING RESEARCH	FINANCE	STORAGE
BUYING	TRANSPORTING	FREE MATCH	MANAGEMENT	RISK

MAKING IT IN MARKETING #4

Marty listened to the radio announcer say, "Train for a marketing career by signing up with your high school Distributive Education Coordinator or with your junior college Marketing Management Coordinator." Marty smiled. He had signed up a year ago. Last year he had gotten classroom instruction about marketing by working in a model business set up right at school. Now, he was ready for the real thing! He was going to train on-the-job as well as study at school. He would train in the afternoons, get course credit, and earn money all at the same time.

Marty remembered his teacher-coordinator saying that all careers in Marketing could be classified into one of the eight basic marketing activities or functions. Marketing is a big area of importance. More than half of the American workers are employed in a marketing or marketing-related job. All of these jobs can be put in one of the eight marketing functions or activities. Management is concerned with all eight marketing functions, and serves as a coordinator of all of the activities or functions in all kinds of businesses and industries.

Marketing Research

An interesting function of Marketing is Marketing Research. Marketing researchers try to find information about the way a business operates or the products a customer wants to buy so that good decisions can be made in running the business. Also, Marketing Research is used to find out what kinds of people would want to buy a certain product. For instance, a new product could be designed and produced, but after a market research project is carried out, the results may show that no one would buy that new product if it was produced in large quantities. So the question would be, why produce the new product if no one would buy it? To find out this kind of information is the purpose of Marketing Research.

Standardization

A most important marketing function is Standardization. It involves the setting of limits or standards for products and services that are produced or distributed. This includes labeling products, such as food, so we know what they contain. It also provides for inspection of goods to see if they meet the standards which have been set for quality, performance, appeal, etc.

Buying

We, as consumers, usually think of buying in terms of purchasing a record or buying insurance. Businesses buy too. Buying is the marketing function that supplies a business with the necessary materials, machinery, and manpower that is needed for business operation or production.

For instance, a fashion buyer in a department store buys fashion clothing from a clothing wholesaler that she thinks that her department store's customers will buy. She is buying the clothing not to wear herself, but rather to resell to the department store's customers.

Selling and Promotion

Selling is probably the most familiar function of all eight Marketing functions. Many people confuse Selling and Marketing. They are not the same. Selling concerns itself with helping customers select those goods and services which will satisfy their **wants** and **needs**. Selling also involves promotional aids to persuade and inform customers.

For instance, if you **want** a bicycle, you can go to a department store or a bicycle shop and have a salesman show you the different styles, colors, and features of their selection of bicycles. By doing this, the salesman can help you satisfy your **want**. If you **need** a new shirt or knit top to wear to school, a salesperson will show you different styles, colors, and fabrics to help you make a choice thus helping you to satisfy a **need**. Sales Promotion helps the marketer to let consumers know that he has a product to sell. Advertising is a Sales Promotion activity. Advertising uses newspapers, magazines, radio, television, billboards, and mail-out flyers to tell their message. Another Sales Promotion activity is Display. The activity of Display uses a real-life set-up like a window display in a business or store, to show off the the goods that it has for sale. Many other promotional and publicity methods are used such as as coupons, trading stamps, and contests.

Storage

Storage provides the time and physical space necessary to house merchandise until it is needed for industrial purposes or distribution to consumers. Many businesses have their own stockrooms or warehouses. Others, especially smaller businesses use wholesaler's warehouse facilities.

Transportation

Transportation provides the service of physically moving property or people from one location to another. Businesses and people use different ways to get to various points. Time and cost are big factors in deciding whether to use a train, a plane, a bus or a truck. Many products are transported by water on barges or freighters. Pipelines are transporters for oil and water.

Marketing Risks

All businesses and individuals, like you must face risks. Risks are the chances or possibilities of financial loss to people or property. These are losses caused by unforeseen or uncontrollable factors. Every time you get into a car, you are taking a chance (assuming a risk) that you will be in an automobile accident. A business takes risks in many ways, such as in ordering the merchandise that customers will buy or in trusting that employees will be honest. As we will see later, some risks cannot be avoided by the businessman, but there are ways in which he can reduce the chance that he will have a loss.

Finance in Marketing

Finance activities supply the money necessary for operation of all marketing and production activities by a business, as well as for the purchases of goods and services by consumers. In a business, the financial advisors must figure all costs including machinery, materials, manpower, and buildings to determine how much money is needed. As we will discuss later, many sources are used by businesses and consumers to obtain money that is needed.

Marketing Management

As we mentioned before, management is not a separate marketing function or activity unto itself. Rather, it is part of all the other functions. It serves as the coordinator of all marketing activities. Each department or division in a business may have a manager, as well as an overall manager or executive who coordinates all resources (people, property, activities, etc.) by planning, organizing, directing, and controlling all activities in order to meet the goals of the business, and thereby make a profit.

Marty pulled into his driveway. He wasn't sure if he wanted the responsibility of being a manager or executive one day. Besides, everybody can't be a chief. But he knew there were many interesting, challenging careers to choose in Marketing. But in which area of Marketing–Marketing Research, Buying, Standardization, Selling, Storage, Transportation, Risk, or Finance? I think I'd like to start working with stock in a warehouse or storeroom, so I can find out more about the merchandise and behind the scenes. Then I might go into selling. I like people. Who knows, maybe one day I will be a manager. . .

MARKETING ACTIVITIES OVERVIEW

1. Finding out what people like or dislike about a product is the purpose of the ________________ function.

2. Setting values or limits for products and services is undertaken by those involved with the ________________ function.

3. Purchasing goods for resale or business use is known as a ________________.

4. Helping to satisfy a customer's wants and needs is the job of the ________________ function.

5. Advertising and display are promotional activities involved in the function of ________________.

6. Providing the time and space needed for merchandise until it is needed is the responsibility of the ________________ activity.

7. The physical movement of products from the producer to the consumer is part of the ________________ function of Marketing.

8. The chances of loss to a business or person by unforeseen or uncontrollable factors are handled by the ________________ function.

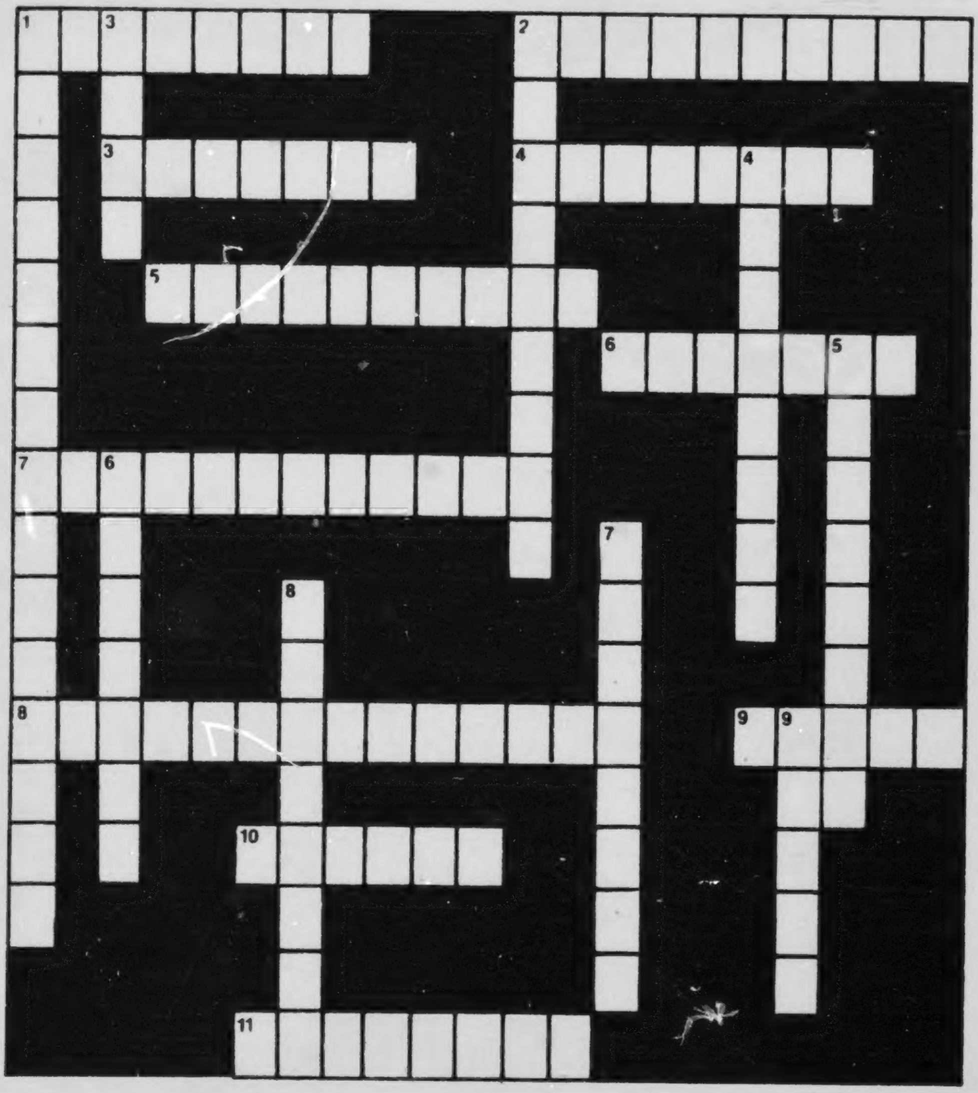
9. The ________________ activity of marketing supplies the money that is necessary for a businesses' operations or a consumers purchases.

10. Controlling and directing all marketing activities is the responsibility of ________________.

MARKETING CROSSWORD PUZZLE

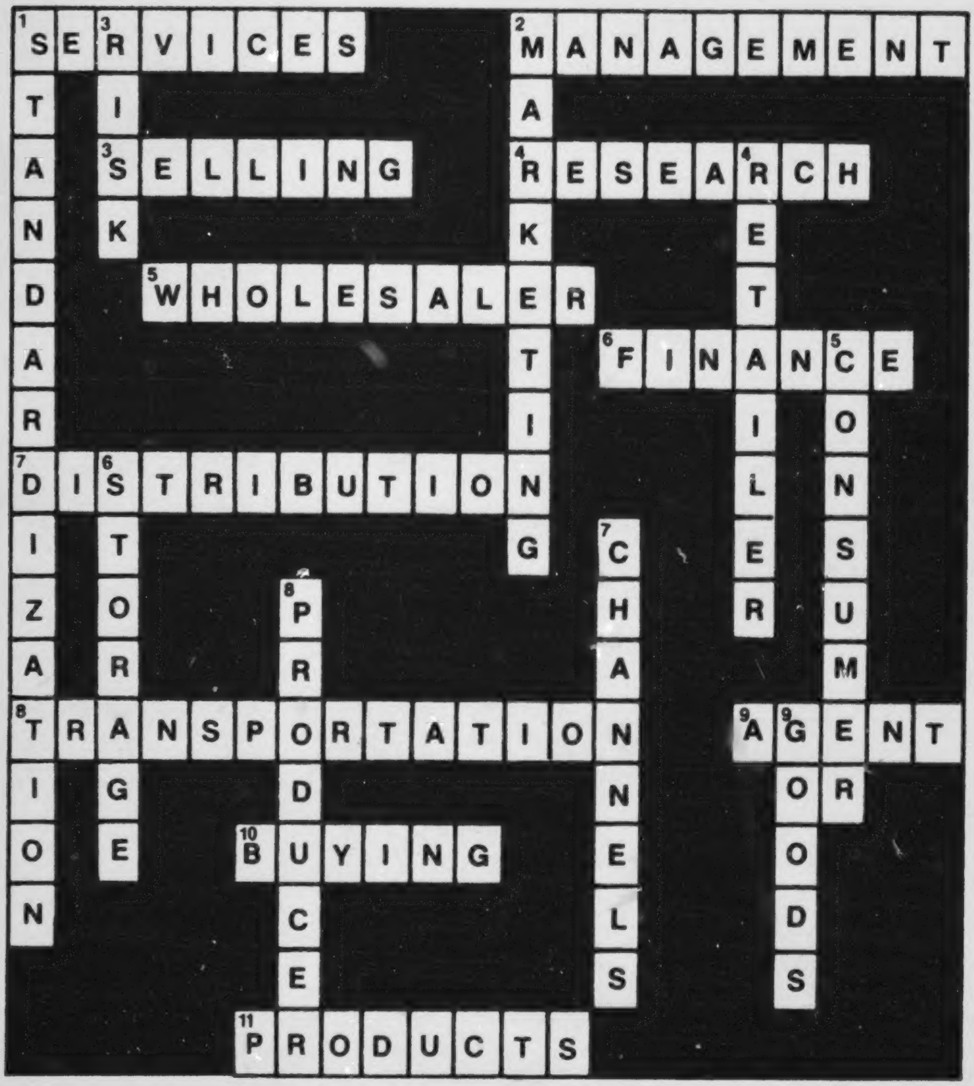
#5

Read each description of a marketing term across and down on the next page. Select the correct word from the list on the bottom of this page and place that term in the appropriate blanks of the puzzle.



Agent
Buying
Channels
Consumer
Distribution
Finance
Goods
Management
Marketing
Producer
Products
Research
Retailer
Risk
Selling
Services
Standardization
Storage
Transportation
Wholesaler

MARKETING CROSSWORD PUZZLE – KEY


1 SERVICES
2 MANAGEMENT
3 SELLING
4 RESEARCH
5 WHOLESALER
6 FINANCE
7 DISTRIBUTION
8 TRANSPORTATION
9 AGENT
10 BUYING
11 PRODUCTS
1 STANDARDIZATION
2 MARKETING
3 RISK
4 RETAILER
5 CONSUMER
6 STORAGE
7 CHANNELS
8 PRODUCE
9 GOODS

ACROSS

1. Buy from and sell to manufacturers, wholesalers, and retailers, as well as to consumers.
2. Serves as a coordinator for all marketing activities.
3. The process of assisting or persuading a customer to make a wise buying decision through personal contact or sales promotion materials.
4. Involves the gathering of information so that marketing managers can make sound decisions and solve marketing problems.
5. Acts as a middleman in distributing goods between the producer and the retailer.
6. Deals with funds necessary for business operations and customer purchases.
7. Includes all marketing activities in the merchandising and supplying of goods and services.
8. Provides the service of physically moving property and people from one location to another.
9. Represents more than one producer in selling goods to businesses for resale to customers.
10. Supplies a business with the necessary materials needed for its use or resale to another business or consumers.
11. Goods or merchandise are often called this.

DOWN

1. Involves setting values or limits for the goods and services, as well as the inspection and labeling to check conformity.
2. Includes all the activities involved in acquiring and distributing goods and services for processing, business use, or personal consumption.
3. Are possibilities of financial loss to people or property by unforeseen or uncontrollable factors.
4. Sells goods directly to the individual consumer, may buy goods directly from the manufacturer or producer, from a wholesaler, or from a special agent.
5. One who purchases goods and services for use, not for resale.
6. Provides the time and space necessary to house merchandise until it is needed for industrial purposes or distribution to consumers.
7. The paths or ways in which products are gotten from the producers to consumers.
8. May be a manufacturer, converter, or an extractor (mining or agriculture).
9. Products that have value are often called this.

WHOLESALE WINDUP

#10

Participants

9 Panelists representing each square
2 Contestants (x and o) to start

1 Moderator/Judge
1 Scorekeeper

Directions

1. Have each student submit 9 questions, one for each of the marketing activities.
2. Each panelist represents one of the nine marketing activities in a square.
3. The moderator/judge and panelists receive copies of the questions and answers.
4. Two contestants are selected to represent x and o.
5. The game is begun by flipping a coin to determine which contestant receives the first question. Each succeeding game is begun by the winner of the previous game.
6. Moderator asks the contestant which panelist (representing a square) he wants to answer the question. Moderator reads the question to the designated panelist who responds with an answer. The contestant must then decide whether or not the panelist has given a correct answer. If the contestant is correct in agreeing or disagreeing, he receives his "x" or "o" in the appropriate square.
7. If the contestant is incorrect in evaluating his selected panelist's answer his opponent earns the square. The third "x" or "o," however, must be earned by a contestant to win the game and not by an incorrect answer of his opponent.
8. A contestant wins a game by securing three "x's" or "o's" in a row, across, down, or diagonally.
9. The winner continues another game. The loser is replaced by a new contestant.
10. If neither contestant secures three "x's" or "o's" in a row, the contestant with five "x's" or "o's" is declared the winner.
11. Scorekeeper should write each of the nine panelist's names in the square that he represents. Games may be played on the blackboard or an overhead projector.
12. Remaining students should replace losing contestants until all students have participated.

GAMEBOARD

Marketing Research	Standardization	Buying
Selling	Storage	Transportation
Finance	Risk	Management

WHOLESALE DISTRIBUTORS

TRI VALLEY GROWERS

Tri-Valley Growers
ASSOCIATES

MITCHELL FOODS
TRUCK
DISTRIBUTORS

PHILLIPS 66

Belcher Oil Co.'s
offshore terminal

HARPER ASSOCIATES
Broker
IMPORT EXPORT

ASTY
WHOLESALE Inc.

FULL SUPPLIER
VACUUM SYSTEMS

Dillon & Co.
Merchandiser
HARDWARE/HOUSEWARES

Frigidaire
Sales Office

SUBURBAN
MANUFACTURING COMPANY
FACTORY REPRESENTATIVES

Smith, Barney & Co.
Incorporated

Sears
SEARS, ROEBUCK AND CO.
Warehouse

#6

WHOLESALING MIX-UPS Unscramble each of the letter groups below to reveal the six major types of wholesalers and the examples of each type that are listed below them.

1. TERMNACH/RELWASHELO ____________________
   - A. LLOEAESHW/ERMHCNAT ____________________
   - B. WHSEAEOLL/ROTIIDSBUTR ____________________
   - C. CARK/DERSINAHCERM ____________________
   - D. HASC/DAN/RARYC ____________________
   - E. KUTRC/ROTIISDTURB ____________________
2. DORPCUERS/SEASL/TOUTELS ____________________
   - A. LASSE/NAHCBR ____________________
   - B. SEASL/FFOCIE ____________________
3. DCTUPRO/MBESSASLER ____________________
   - A. NIPEDNENEDT/AEDERL ____________________
   - B. TIVEERAPOOC/CIAONITOSSA ____________________
   - C. SISONIMMOC/YERUB ____________________
   - D. RAING/LEAVEROT ____________________
4. GNESTA/NAD/KSERBRO ____________________
   - A. URERSCAFTUNAM/EGNAT ____________________
   - B. DEPINNENEDT/ORBKRE ____________________
   - C. SSIIMMOONC/TNEGA ____________________
   - D. ESLLNIG/ATGNE ____________________
   - E. RUPAHCGINS/NEGAT ____________________
   - F. CUATION/PMOCNAY ____________________
5. LUEMOTRPE/KLBU ____________________
   - A. TLNAP ____________________
   - B. MERTNIAL ____________________
   - C. TTLOBDE/SAG ____________________
6. NHAIC/SAREWOUHE ____________________
   - A. TREIAL/RASEOWHUE ____________________
   - B. VERCISE/HERUWASOE ____________________

WHOLESALING MIX-UP - KEY

1. TERMNACH/RELWASHELO	MERCHANT WHOLESALER
A. LLOEAESHW/ERMHCNAT	WHOLESALE MERCHANT
B. WHSEAEOLL/ROTIIDSBUTR	WHOLESALE DISTRIBUTOR
C. CARK/DERSINAHCERM	RACK MERCHANDISE
D. HASC/DAN/RARYC	CASH AND CARRY
E. KUTRC/ROTIISDTURB	TRUCK DISTRIBUTOR
2. DORPCUERS/SEASL/TOUTELS	PRODUCER'S SALES OUTLETS
A. LASSE/NAHCBR	SALES BRANCH
B. SEASL/FFOCIE	SALES OFFICE
3. DCTUPRO/MBESSASLER	PRODUCT ASSEMBLER
A. NIPEDNENEDT/AEDERL	INDEPENDENT DEALER
B. TIVEERAPOOC/CIAONITOSSA	COOPERATIVE ASSOCIATION
C. SISONIMMOC/YERUB	COMMISSION BUYER
D. RAING/LEAVEROT	GRAIN ELEVATOR
4. GNESTA/NAD/KSERBRO	AGENTS AND BROKERS
A. URERSCAFTUNAM/EGNAT	MANUFACTURERS AGENT
B. DEPINNENEDT/ORBKRE	INDEPENDENT BROKER
C. SSIIMMOONC/TNEGA	COMMISSION AGENT
D. ESLLNIG/ATGNE	SELLING AGENT
E. RUPAHCGINS/NEGAT	PURCHASING AGENT
F. CUATION/PMOCNAY	AUCTION COMPANY
5. LUEMOTRPE/KLBU	PETROLEUM BULK
A. TLNAP	PLANT
B. MERTNIAL	TERMINAL
C. TTLOBDE/SAG	BOTTLED GAS
6. NHAIC/SAREWOUHE	CHAIR WAREHOUSE
A. TREIAL/RASEOWHUE	RETAIL WAREHOUSE
B. VERCISE/HERUWASOE	SERVICE WAREHOUSE

#7

THE WORLD OF WHOLESALING #8

Many marketing career opportunities are available within the six major types of wholesale businesses:

Merchant Wholesalers – buy goods from producers, take title to the goods, break bulk, warehouse, sell, extend credit, and deliver goods to businesses for resale or for business use. Examples of these wholesalers include:

a. *Wholesale Merchant* - sells, delivers, provides many services, extends credit; carries a variety of related products from many manufacturers (hardware, drugs, toys).

b. *Wholesale Distributor* – represents one or more manufacturers for the storage, sale, and delivery of the goods within a certain region of the country (automobiles, appliances and heavy equipment).

c. *Rack Merchandiser* – sells and delivers goods to retailers; services the rack of merchandise in the store by refilling, removing, pricing, and arranging items; keeps title to goods until they are sold (fast moving items such as housewares, novelties, beauty aids, and candy).

d. *Cash and Carry* – sells merchandise to businesses at the wholesaler's warehouse; does not deliver goods or extend credit (hardware, novelties, housewares, beauty aids).

e. *Truck Distributor* – combines selling and delivery of goods at one time along certain routes at given intervals of time (dairy products, bakery goods, produce, snack foods).

Producers Sales Outlets – special business locations set up by a manufacturer or other producer to promote and sell its merchandise.

a. *Sales Branch* – stores and sells goods; provides merchandise showroom and services (electrical parts and equipment, business machines and supplies).

b. *Sales Office* – sells to and services accounts in a certain territory; has goods shipped from the place of production or merchant wholesaler's warehouse (farm equipment, machinery, appliances).

Petroleum Bulk Plants and Terminals – stores and sells petroleum products to service stations, commercial oil distributors, and business users; may handle related products.

a. *Plant* – receives supply by truck or rail; stores and sells liquid to retailers, commercial distributors, or business users (gasoline, fuel oil, kerosene).

b. *Terminal* – receives supply by tanker, barge, or pipeline; stores and sells petroleum product to retailers or business users (gasoline, kerosene, fuel oil).

c. *Gas Facility* – distributes liquified petroleum gas by bulk or bottle to retailers, wholesalers, or business users.

Agents and Brokers – do not own goods, but assist in buying, storing, and selling of merchandise:

a. *Manufacturer's Agent* – acts as an independent salesman for a manufacturer's goods if they are not competing lines (furniture, home furnishings, clothing).

b. *Brokers* – represent many buyers and sellers and do not own or handle the goods (textiles, coffee, sugar).

c. *Commission Agent* – stores and sells goods for the seller but does not own them; collects money for goods sold, deducts his expenses, and sends balance to producer (fruits, vegetables, poultry).

d. *Selling Agent* – assumes sales department function of a producer by contracting for its entire output during a certain period of time, but does not own goods.

e. *Purchasing Agent* – buys merchandise for businesses acting as their buying staff, does not own goods, usually does not handle goods; known as a resident buyer when buying dry goods such as apparel.

f. *Auction Companies*– independent businesses which provide a place for different buyers to bid on merchandise which is displayed and described (tobacco, bananas, used automobiles, grains).

Product Assembler – buys farm products in small amounts; grades and combines goods into large quantities; and stores, resells, and delivers the product.

a. *Independent Dealer* – privately-owned business which buys and assembles goods and resells quickly for profit.

b. *Cooperative Association* – group of local producers who collectively bargain for better prices, reduce selling costs, and obtain better grading.

c. *Commission Buyer* – acts as a buying agent on a commission basis for businesses, such as packing houses, canneries, or central market cotton merchants.

d. *Grain Elevators* – privately-owned business that operates on its own or acts for a producer; buys, grades, cleans, mixes, stores, sells, and ships grain.

Chain Warehouses – branch headquarters for a large service chain retail chain of stores; buys, inspects, sorts, stores, and delivers merchandise to member stores or service establishments.

THE WHOLESALE MAZE

#9

A product is being shipped from its producer to a wholesaler--but which one? Different types of wholesalers are shown in the maze below. Can you find out which of them will receive it by tracing the trail from the producer to it? When you have completed that task, list each of the types under its appropriate classification of wholesalers named below.

MERCHANT WHOLESALERS

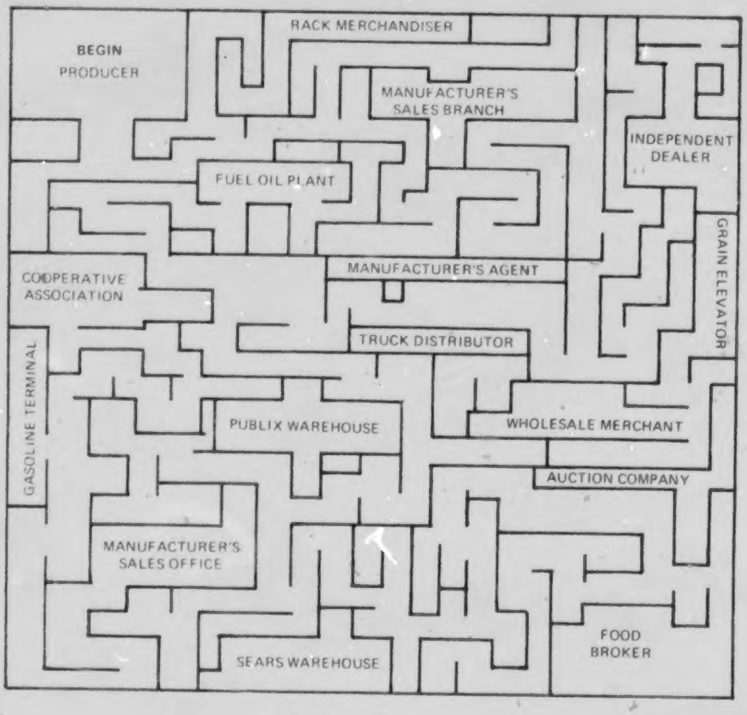
AGENTS/BROKERS

PRODUCT ASSEMBLERS

PRODUCERS OUTLETS

PETROLEUM BULK STORAGE

CHAIN WAREHOUSE


BEGIN
PRODUCER
RACK MERCHANDISER
MANUFACTURER'S SALES BRANCH
INDEPENDENT DEALER
FUEL OIL PLANT
GRAIN ELEVATOR
COOPERATIVE ASSOCIATION
MANUFACTURER'S AGENT
TRUCK DISTRIBUTOR
GASOLINE TERMINAL
PUBLIX WAREHOUSE
WHOLESALE MERCHANT
AUCTION COMPANY
MANUFACTURER'S SALES OFFICE
SEARS WAREHOUSE
FOOD BROKER

THE WHOLESALE MAZE KEY

#9

A product is being shipped from its producer to a wholesaler—but which one? Different types of wholesalers are shown in the maze below. Can you find out which of them will receive it by tracing the trail from the producer to it? When you have completed that task, list each of the types under its appropriate classification of wholesalers named below.

MERCHANT WHOLESALERS

Wholesale Merchant

Rack Merchandiser

Truck Distributor

AGENTS/BROKERS

Manufacturer's Agent

Food Broker

Auction Company

PRODUCT ASSEMBLERS

Grain Elevator

Independent Dealer

Cooperative Association

PRODUCERS OUTLETS

Manufacturer's Sales Office

Manufacturer's Sales Branch

PETROLEUM BULK STORAGE

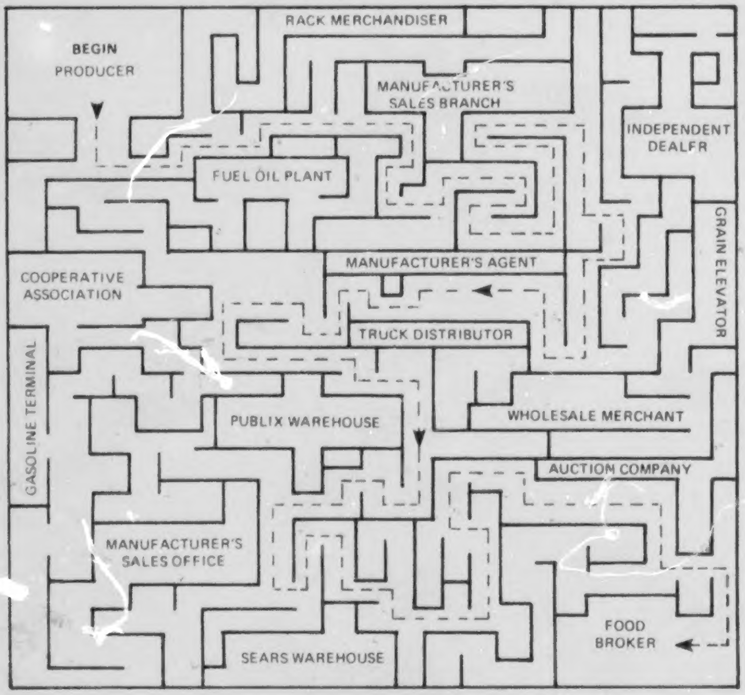
Fuel Oil Plant

Gasoline Terminal

CHAIN WAREHOUSE

Publix Warehouse

Sears Warehouse


BEGIN
PRODUCER
RACK MERCHANDISER
MANUFACTURER'S SALES BRANCH
INDEPENDENT DEALER
FUEL OIL PLANT
GRAIN ELEVATOR
MANUFACTURER'S AGENT
COOPERATIVE ASSOCIATION
TRUCK DISTRIBUTOR
GASOLINE TERMINAL
PUBLIX WAREHOUSE
WHOLESALE MERCHANT
AUCTION COMPANY
MANUFACTURER'S SALES OFFICE
FOOD BROKER
SEARS WAREHOUSE

MARKETING ACTIVITIES IN WHOLESALING

#II

Read each of the following wholesaling situations and decide which marketing function or activity is described. Place your answer in the blank to the left of each situation.

_________________________ 1. Pam was gathering information about customer likes for candy by calling on the telephone.

_________________________ 2. George inspected the boxes as they were loaded on the delivery trucks.

_________________________ 3. Marcia ordered 150 new sets of china for her warehouses.

_________________________ 4. Chuck helped his customer select stereo speakers for his sound center shops.

_________________________ 5. Melvin drove the truck with the shipment of furniture to the customer's store.

_________________________ 6. Paul unpacked the boxes and placed the cans on the warehouse shelves.

_________________________ 7. Judy was taking a chance that the new shipment of goods would sell.

_________________________ 8. Ben assisted the businessman in selecting the lawnmower which would satisfy his customers.

_________________________ 9. Sarah finished putting the new display props around the floor display.

_________________________ 10. Harold called all department heads together to plan activities for the upcoming year.

_________________________ 11. Melanie was gambling that the records would sell before the bill was due.

_________________________ 12. As the comptroller, Phil estimated the money needed to finance the new warehouse expansion.

_________________________ 13. Neil decided to palce a full page ad in the trade journal as a part of the ad campaign he planned.

_________________________ 14. Ed called a meeting to talk to all of his employees about the new policies he had just established.

_________________________ 15. Tish checked the rows of games on hand in the warehouse to prepare for the phone orders that arrived.

MARKETING ACTIVITIES

Marketing Research
Buying
Standardization
Selling
Storage
Transportation
Finance
Risk
Management

BUYER'S BINGO

#12

Participants

1 Caller

1 Checker

Class Players

Preparation

Duplicate copies of the gameboard illustrated on the following page so that each class player has a card. Prepare a class set with the buying careers arranged in various orders or have the students select their own careers and write them in the appropriate column of the card.

Have students collect scraps of paper, cardboard, or plastic for markers. Bottle caps, buttons, or paper clips are some items which may be used to mark the squares as the game is played.

Type or write the various buying careers on slips of construction paper or cardstock. Place these face down in a cardboard box, a jar, or any similar container from which the caller may draw the slips in the game.

Directions

Distribute one game card to each student. If the card is not already completed with buying careers, have each student select three buying careers for each of the columns. Be sure the careers are in the correct career level column. Give each student nine markers for his card.

The caller will mix the slips of paper in the container. He will draw a slip and read off the buying career title and its career level. If a student has that career on his card, he places a marker on that square. The first student to cover three squares in a row across, down, or diagonally wins the game.

After a player has won a game, all markers are removed from game cards, and a new game begins. Rewards or prizes may be given for each game played as well as to the champion if a student should win more than one game during the class period.

Buying Careers

Job Entry

- Comparison Shopper
- Product Tester
- Telephone Surveyor
- Personal Interviewer
- Inventory Control Clerk
- Stockman
- Sales Clerk

Advanced Career

- Assistant Buyer
- Purchasing Agent
- Merchandise Distributor
- Marketing Research Trainee
- Buyer Trainee
- Counterman

Management/Specialist

- Head Buyer
- Specialty Buyer
- Purchasing Manager
- Broker
- Merchandise Manager
- Marketing Research Analyst

Buyer's Bingo Gameboard

MANAGEMENT	ADVANCED	JOB ENTRY

BUYER'S QUEST

#13

Listed below are 21 wholesale buying careers grouped under three career level headings. The Management / Specialist Careers are highly skilled and experienced personnel who supervise and direct employees or provide important information to management. The Advanced Careers include positions in which skills have been developed and experience acquired. The Job Entry Careers are beginning workers with little skills or experience.

Can you find each of the 21 careers in the puzzle on the next page? Hint: There are 9 careers across, 7 careers down, and 5 careers diagonally.

Management / Specialist Careers

Merchandise Manager
Head Buyer
Marketing Research Analyst
Purchasing Manager
Specialty Buyer
Resident Buyer
Broker

Advanced Careers

Assistant Buyer
Purchasing Agent
Buyer Trainee
Merchandise Distributor
Counterman
Marketing Research Trainee

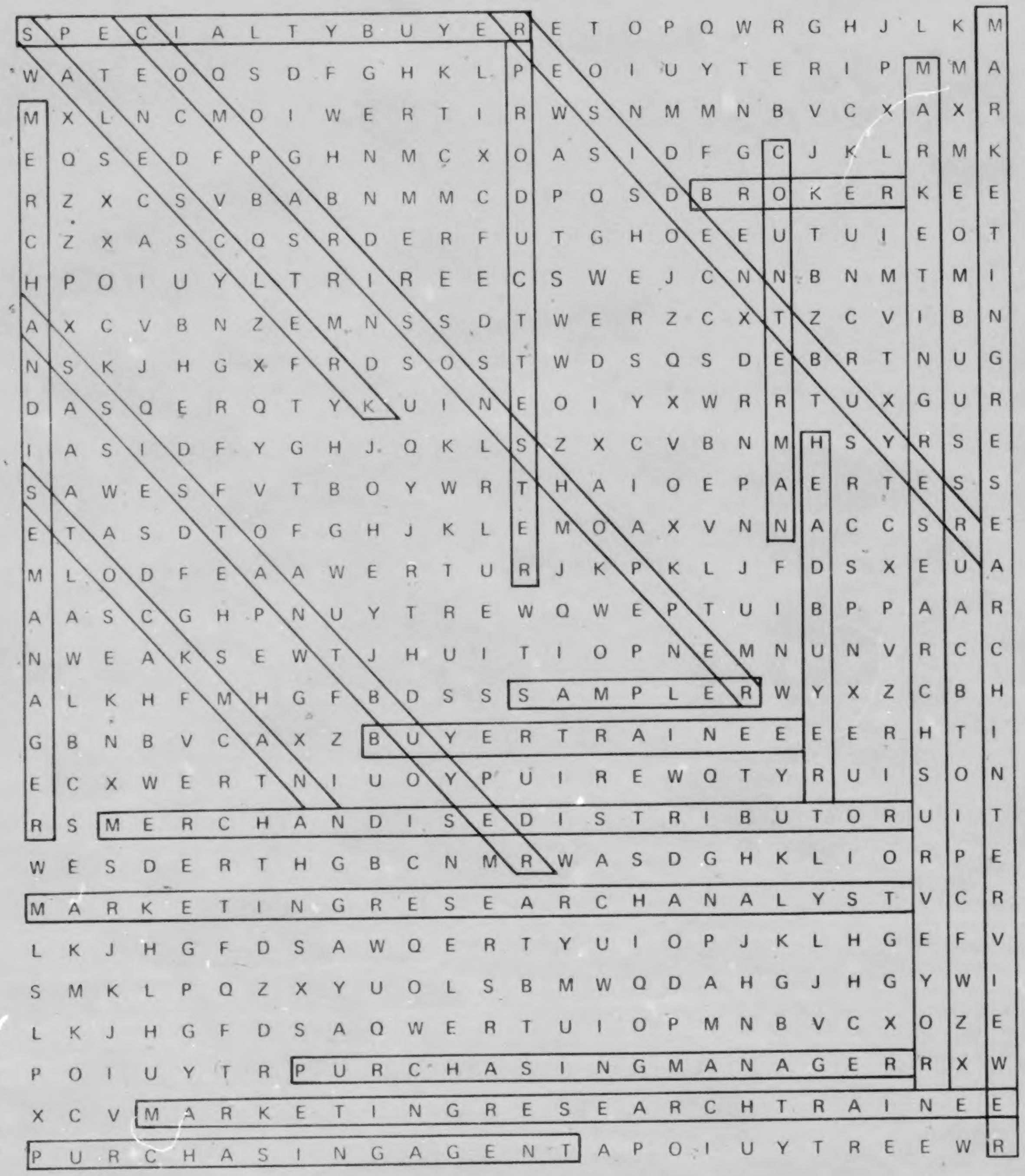
Job Entry Careers

Inventory Control Clerk
Marketing Research Surveyor
Comparison Shopper
Stockman
Sampler
Salesclerk
Marketing Research Interviewer
Product Tester

BUYER'S QUEST

S P E C I A L T Y B U Y E R E T O P Q W R G H J L K M
W A T E O Q S D F G H K L P E O I U Y T E R I P M M A
M X L N C M O I W E R T I R W S N M M N B V C X A X R
E Q S E D F P G H N M C X O A S I D F G C J K L R M K
R Z X C S V B A B N M M C D P Q S D B R O K E R K E E
C Z X A S C Q S R D E R F U T G H O E E U T U I E O T
H P O I U Y L T R I R E E C S W E J C N N B N M T M I
A X C V B N Z E M N S S D T W E R Z C X T Z C V I B N
N S K J H G X F R D S O S T W D S Q S D E B R T N U G
D A S Q E R Q T Y K U I N E O I Y X W R R T U X G U R
I A S I D F Y G H J Q K L S Z X C V B N M H S Y R S E
S A W E S F V T B O Y W R I H A I O E P A E R T E S S
E T A S D T O F G H J K L E M O A X V N N A C C S R E
M L O D F E A A W E R T U R J K P K L J F D S X E U A
A A S C G H P N U Y T R E W Q W E P T U I B P P A A R
N W E A K S E W T J H U I T I O P N E M N U N V R C C
A L K H F M H G F B D S S S A M P L E R W Y X Z C B H
G B N B V C A X Z B U Y E R T R A I N E E E E R H T I
E C X W E R T N I U O Y P U I R E W Q T Y R U I S O N
R S M E R C H A N D I S E D I S T R I B U T O R U I T
W E S D E R T H G B C N M R W A S D G H K L I O R P E
M A R K E T I N G R E S E A R C H A N A L Y S T V C R
L K J H G F D S A W Q E R T Y U I O P J K L H G E F V
S M K L P Q Z X Y U O L S B M W Q D A H G J H G Y W I
L K J H G F D S A Q W E R T U I O P M N B V C X O Z E
P O I U Y T R P U R C H A S I N G M A N A G E R [illegible] X W
X C V M A R K E T I N G R E S E A R C H T R A I N E E
P U R C H A S I N G A G E N T A P O I U Y T R E E W R

BUYER'S QUEST KEY



S	P	E	C	I	A	L	T	Y	B	U	Y	E	R	E	T	O	P	Q	W	R	G	H	J	L	K	M
W	A	T	E	O	Q	S	D	F	G	H	K	L	P	E	O	I	U	Y	T	E	R	I	P	M	M	A
M	X	L	N	C	M	O	I	W	E	R	T	I	R	W	S	N	M	M	N	B	V	C	X	A	X	R
E	Q	S	E	D	F	P	G	H	N	M	C	X	O	A	S	I	D	F	G	C	J	K	L	R	M	K
R	Z	X	C	S	V	B	A	B	N	M	M	C	D	P	Q	S	D	B	R	O	K	E	R	K	E	E
C	Z	X	A	S	C	Q	S	R	D	E	R	F	U	T	G	H	O	E	E	U	T	U	I	E	O	T
H	P	O	I	U	Y	L	T	R	I	R	E	E	C	S	W	E	J	C	N	N	B	N	M	T	M	I
A	X	C	V	B	N	Z	E	M	N	S	S	D	T	W	E	R	Z	C	X	T	Z	C	V	I	B	N
N	S	K	J	H	G	X	F	R	D	S	O	S	T	W	D	S	Q	S	D	E	B	R	T	N	U	G
D	A	S	Q	E	R	Q	T	Y	K	U	I	N	E	O	I	Y	X	W	R	R	T	U	X	G	U	R
I	A	S	I	D	F	Y	G	H	J	Q	K	L	S	Z	X	C	V	B	N	M	H	S	Y	R	S	E
S	A	W	E	S	F	V	T	B	O	Y	W	R	T	H	A	I	O	E	P	A	E	R	T	E	S	S
E	T	A	S	D	T	O	F	G	H	J	K	L	E	M	O	A	X	V	N	N	A	C	C	S	R	E
M	L	O	D	F	E	A	A	W	E	R	T	U	R	J	K	P	K	L	J	F	D	S	X	E	U	A
A	A	S	C	G	H	P	N	U	Y	T	R	E	W	Q	W	E	P	T	U	I	B	P	P	A	A	R
N	W	E	A	K	S	E	W	T	J	H	U	I	T	I	O	P	N	E	M	N	U	N	V	R	C	C
A	L	K	H	F	M	H	G	F	B	D	S	S	S	A	M	P	L	E	R	W	Y	X	Z	C	B	H
G	B	N	B	V	C	A	X	Z	B	U	Y	E	R	T	R	A	I	N	E	E	E	E	R	H	T	I
E	C	X	W	E	R	T	N	I	U	O	Y	P	U	I	R	E	W	Q	T	Y	R	U	I	S	O	N
R	S	M	E	R	C	H	A	N	D	I	S	E	D	I	S	T	R	I	B	U	T	O	R	U	I	T
W	E	S	D	E	R	T	H	G	B	C	N	M	R	W	A	S	D	G	H	K	L	I	O	R	P	E
M	A	R	K	E	T	I	N	G	R	E	S	E	A	R	C	H	A	N	A	L	Y	S	T	V	C	R
L	K	J	H	G	F	D	S	A	W	Q	E	R	T	Y	U	I	O	P	J	K	L	H	G	E	F	V
S	M	K	L	P	Q	Z	X	Y	U	O	L	S	B	M	W	Q	D	A	H	G	J	H	G	Y	W	I
L	K	J	H	G	F	D	S	A	Q	W	E	R	T	U	I	O	P	M	N	B	V	C	X	O	Z	E
P	O	I	U	Y	T	R	P	U	R	C	H	A	S	I	N	G	M	A	N	A	G	E	R	R	X	W
X	C	V	M	A	R	K	E	T	I	N	G	R	E	S	E	A	R	C	H	T	R	A	I	N	E	E
P	U	R	C	H	A	S	I	N	G	A	G	E	N	T	A	P	O	I	U	Y	T	R	E	E	W	R

BUYING FOR A WHOLESALER

#14

Wholesale buying is one of the most interesting career areas in the business today. It involves selecting the right goods from all over the world and getting them delivered at the right time for resale to customers.

In buying for retail customers, the wholesaler must be aware of consumer desires and demands in his area as well as the kinds of consumers who patronize his retail customers. Whether his customers are retailers, industries, institutions, or commercial users, the wholesale buyer must decide what his customers want, how much is wanted, where it should be purchased, and when it should be bought and delivered.

Buying, then, is the marketing function which supplies the wholesale business with merchandise for resale to its business customers. Buying activities occur in all types of wholesale businesses, whether they be large or small. In smaller concerns, the manager often handles the buying activities, as well as decisions. Reordering of basic goods may be done by a warehouseman.

In wholesale distribution businesses, the buying personnel generally perform three of the eight major marketing functions: marketing research, standardization, as well as that of buying.

Marketing research activities involve the gathering of information concerning customer preferences, business trends, and general economic conditions in order to make wise buying decisions.

Standardization activities include the implementation and enforcement of the standards set by the management for the business' image and the type of merchandise it should carry. In some instances, the buyer or merchandise manager is responsible for actually developing standards for the merchandise sold by the business. The buying staff may be charged with inspecting and testing merchandise before it is actually purchased.

All buying careers may be classified into one of the following levels:

Entry Level - beginning job with little skills or experience required.

Career Level - position with developed skills and experience.

Management / Specialist Level - highly skilled and experienced careers including supervisory and executive personnel.

Some of the wholesale buying career opportunities available according to their career levels are:

MANAGEMENT/SPECIALIST CAREER LEVEL

Resident Buyer	buys apparel, dry goods, general merchandise for wholesalers from his office located at a central market.
Merchandise Manager	determines all merchandising policies, coordinates all merchandising activities, including buying, personal selling, and sales promotion, for wholesale business.
Head Buyer	orders merchandise for a wholesaler to resell.
Specialty Buyer	orders one type of merchandise carried by the business, such as sporting goods or lawnmowers.
Broker	buys goods or services as an agent for wholesalers in a certain area, such as coffee or sugar.
Marketing Research Analyst	studies and interprets information gathered; makes recommendations about market conditions and business trends.
Purchasing Manager	supervises all buying activities and personnel for the business.

ADVANCED CAREER LEVEL

Assistant Buyer	assists the head buyer in determining what merchandise to order; communicates closely with the sales personnel.
Buyer Trainee	assists the buyers and assistant buyers by providing information concerning stock turnover, oversees rotation of stock, and often serves as a salesman or order dispatcher.
Marketing Research Trainee	assists the marketing research analyst in reviewing and interpreting survey data from consumers.
Merchandise Distributor	buys goods from a producer and handles sales, service, and promotion from a central warehouse to retail chain stores for a certain region of the country.
Salesman	highly skilled in helping his customer choose the products, brands, and promotional aids needed for business use or resale.
Purchasing Agent	writes and processes orders for staple goods carried by the wholesaler.

JOB ENTRY CAREER LEVEL

Comparison Shopper	investigates merchandise and promotional policies of a competitor's business or showroom.
Product Tester / Sampler	examines the product in performance or uses one of the senses (eyes, mouth, etc.) to determine the quality of a product.
Counterman	assists the customer in selecting goods, handles the sale and bagging; may become a buyer trainee.
Marketing Research Surveyor	conducts a marketing research survey of consumers by telephone to determine interests and likes.
Marketing Research Interviewer	conducts a survey in person of consumers to discover their preferences.

Some large wholesale firms have many personnel to handle the different buying activities. In smaller establishments, a single person (many times the manager as well) may perform all of the necessary buying activities. Thus, depending upon the type of business, the personnel may only be involved in part of the buying decisions.

Very few wholesalers would have all of the buying careers identified above. In many instances, the major buying decisions and activities are performed by a company vice-president. Rather than having a merchandise manager, purchasing manager, or a head buyer, the vice-president may be designated as Vice-President for Merchandising or Vice-President for Purchasing.

DIRECTIONS: Written below are examples of wholesale buying situations. Indicate what job title in the buying department is responsible for completing it by writing the job title in the blank spaces provided.

1. Bill is busy on the phone trying to come to an agreement with a manufacturer as to what price to resell a shipment of asphalt tile to retailers.

   ____

2. Susan is going to make a trip to various retail stores to help her complete a report on how retailers are displaying stainless steel cookware.

   ____

3. Joe has been asked to assist in reviewing want slips to aid in determining a buying plan for fishing rods and reels in the sporting goods department of a wholesale firm.

   ____

4. Jim has been asked to make a durability test on a sample of fiber-glass material for a new style of fishing rods. rods.

   ____

5. A new name dishwasher has been brought to the attention of ACME Wholesalers by its manufacturer. The product looks promising but the buyer for the firm needs more information; such as, how many people would have a need for this product, how many have been sold so far, are retailers interested in carrying it? He gave this assignment to Vera, who has the title of

   ____

A WHOLESALE BUYER'S DECISIONS

#14

Wholesale buyer Nat Hall wants to buy a carload of 700 power lawn mowers from the Henry Stratton Mower Company. He wonders, though, if he can sell them during the spring and summer season of 1975. What information can he secure from the following records that will help him in making his buying decision? He can profitably sell the mowers for $49.95.

1. In 1974 he sold 400 lawn mowers at $59.95 to his dealers throughout the state.
2. His present stock consists of 50 lawn mowers at $59.95.
3. His Research Department did a survey of his lawn mower dealers and discovered that 1974 had been a good year for the lawn mower business and that their stocks are now depleted.
4. A consumer survey shows that 40% of the consumers contacted owned lawn mowers 5 years old or older.
5. His Testing and Standards Division has determined that the Stratton mower at $49.95 is of equal quality and durability to the ones he owns at resale price of $59.95.
6. Now we come to what he has learned from his past sales records, stock records, plus the market surveys and testings that will help him in his buying decision.
   a. How many mowers did he buy in 1974? ______________
   b. Should he buy the 700 mowers at $49.95 resale price? __________
   c. What should he do with the 50 mowers he has left at $59.95? _______
      (1) Mark them down to $49.95? __________
      (2) Take advantage of the extra mark up and mark the new mowers up to $59.95? __________
      (3) Mark the new mowers $59.95 for April, May and June, and then run a special sale at $49.95 in July on all of the mowers left in stock? __________

Be certain that you keep in mind that he is buying 700 mowers this year when he bought much less than that amount in 1974.

BUYER'S MINDBENDER*

#15

The merchandise manager is developing a chart of his buying-related personnel. His chart has 36 squares. He has twelve career titles to place in the squares. He has placed one in the left top corner and one in the bottom right corner.

He wants to arrange the other ten careers on the chart, so that each row, across, down, and diagonally, has two buying careers in it. In addition, the careers must be in the two columns which correspond to its career level. For example, a job entry career must be placed in the fifth and sixth columns.

Cut out each of the buying career circles below and arrange them in the correct order so that two circles will be in each row—across, down, and diagonally—and four careers will be charted for each of the career levels.

Specialty Buyer

Merchandise Distributor

Assistant Buyer

Stockman

Product Tester

Head Buyer

Research Analyst

Purchasing Agent

Buyer Trainee

Inventory Control Clerk

---

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BUYER'S MINDBENDER

MANAGEMENT / SPECIALIST		ADVANCED CAREER		JOB ENTRY	
Purchasing Manager					
					Comparison Shopper

BUYER'S MINDBENDER —KEY

MANAGEMENT / SPECIALIST		ADVANCED CAREER		JOB ENTRY	
Purchasing Manager		Assistant Buyer			
		Purchasing Agent		Stockman	
Specialty Buyer	Research Analyst				
				Inventory Control Clerk	Product Tester
	Head Buyer		Buyer Trainee		
			Merchandise Distributor		Comparison Shopper

WHO'S WHO IN WHOLESALE BUYING

#16

Head Buyer

Jill Jordan is the head buyer for housewares at The Wholesaler's. As a buyer, Jill must keep up to date on all current fashions, styles, fads, and trends. She subscribes to the *Housewares Today* journal and carefully reads the reports and articles in each issue. Twice each year Jill visits the market in New York where she studies the latest products on display and talks with sales representatives from the various manufacturers. She reviews the want slips sent to her periodically from the sales manager, and carefully reviews the sales records to determine which items are selling best including prices, sizes, colors, styles, and types of material. In addition to this, Jill studies the reports submitted by the comparison shopper in the company and analyzes the results of the customer surveys conducted by the marketing research specialists. Once merchandise is received, Jill must assist the Sales Department in introducing the new merchandise to the sales personnel.

Jill's job is full of variety as no two days are ever alike. She has a great responsibility as a buyer since she must select the merchandise to be purchased for resale in her business at the right price, in the right quantities, at the right time, and from the right source. If she makes the wrong decision, her company will lose money and could eventually go out of business.

Specialty Buyer

Millie Freeman works closely with the Head Buyer, Jill Jordan. Millie is responsible for buying cooking utensil lines for the company's warehouses. She reviews all records and reports pertaining to kitchen cookware, makes recommendations to the Head Buyer, and prepares a buying plan for upcoming purchasing seasons.

Assistant Buyer

Jack Thompson is the assistant buyer for housewares at The Wholesaler's. He works under the supervision of Jill Jordan, the head buyer.

Jack works closely with the Head Stockman in the Stockkeeping Department as well as the inventory control clerks in the finance office. When a shipment of merchandise is received from the manufacturer, he checks to see that the quantity and quality of the stock matches the purchase order. Once he verifies this, he authorizes payment of the invoices or returns the shipment.

Jack furnishes the markers with the information received on merchandise ticket including such items as price, manufacturer number, season code, cost code, and style number. He also notifies them of markdown prices on merchandise to be reduced.

Marketing Research Specialists

John Teidman works as a *Marketing Research Analyst* in the central buying office for The Wholesaler. His job is of great importance as he gathers, compiles, and interprets information which will assist the buyer and store managers in many of their management discussions and policies.

Last year John surveyed the company's customers about delivery, counter sales, hours, and various customer services. The information obtained in this survey resulted in the construction of a new warehouse, Saturday shopping in the company's counter sales department, and the purchase of two delivery trucks.

This month John is gathering data on his company's competitors by analyzing their prices, sales, and methods of operation. Much of their information is furnished to him by the comparison shoppers.

John has several marketing research workers who assist him in conducting surveys. Max and Mary Jane are *Personal Interviewers* who question people around town, in their homes, and at their place of business. They were very active in determining the possibility of constructing a new warehouse.

Robert and Winnie question people on the telephone to determine their desires and preferences concerning products, personnel, policies, and services. They were involved in John's survey last year on facilities and services. These *Telephone Surveyors* must be pleasant, tactful, and persuasive to obtain the desired data on the telephone from the persons selected for the survey.

Comparison Shopper

Jan Stevens is employed as a Comparison Shopper at The Wholesaler's. Jan's job is an important one as she provides her company with valuable information about her employer's competitors. Her work is rarely monotonous as she visits different businesses almost every day taking careful notes as to the brand and quality of merchandise carried, the price, how it is displayed and advertised and many other details about the merchandise that will be useful to her company in setting prices and determining buying policies.

One day Jan may "shop" for lamps; the next day she may "shop" for appliances, while the following week she may compare tape decks.

She enjoys her job and knows that she is obtaining valuable experience which may one day qualify her for the position of assistant buyer.

Merchandise Manager

David Everett is responsible for all buying and selling activities within the company. He works directly with the head buyers, establishing the buying policies and plans for the company. In addition, he works very closely with the advertising, publicity, and sales promotion personnel in developing sales promotion campaigns for The Wholesaler's merchandise. He meets with the general manager and other company executives in determining overall policies and plans for the business.

Resident Buyer

Reba James works for a central buying office in New York. As a resident buyer, she purchases merchandise for wholesalers that cannot come to market themselves to buy goods. She requests information about the wholesaler and the business customers they serve. She is always up-to-date on the latest styles and models since she is located close to major showrooms and manufacturer's factories.

Merchandise Distributor

Charles Frazier is a merchandise distributor for a chain store. He works in the central buying office of the main store in Miami. He performs a wholesaling function for the retailer.

Charles gathers and compiles information from all of the stores in the chain as to their merchandise needs. He then allocates the merchandise to the individual stores from the central warehouse.

Charles' job requires that he be competent in record keeping and stockkeeping, and that he be capable of making decisions. He started his career as a stockclerk in one of the stores and later worked as a sales person in home furnishings. He hopes to be promoted to assistant buyer of home furnishings and eventually to head buyer as this is his career goal.

Product Evaluators

Chad, Diane, Sylvia, and Wallace are employed by large wholesalers who buy large quantities of goods and want to determine the quality and/or performance of the goods they will buy. Chad and Diane are *Product Testers* who actually analyze products, such as appliances, while they are being used to determine their effectiveness. Sylvia and Wallace are responsible for judging products that require the use of the senses–taste, touch, smell, sight, and sound. As *Samplers* for the company, they must actually use their senses by tasting, listening, viewing, smelling, or feeling products. Some of the merchandise which they evaluate include perfumes, wines, and fabrics.

1. I'm an entry level job who loves to shop. I go from business to business but I never buy anything.

Who am I? ____________________

2. I buy all the merchandise for a certain area of our warehouses, but never pay for it.

Who am I? ____________________

3. I call customers on the telephone to find out how they feel about the company's products, services, and personnel, so we can better satisfy them. Who am I? ____________________

4. I keep buyers and top management informed about market conditions and business trends.

Who am I? ____________________

5. I help customers select merchandise and fill out customer want slips for merchandise we don't have.

Who am I? ____________________

6. I supervise all buyers and buying activities for certain kinds of merchandise. Who am I? ____________________

7. I am a buying career that shops for others at the central market while they stay at home.

Who am I? ____________________

8. I set all buying policies and plans in conjunction with the top management of the business.

Who am I? ____________________

9. I ask customers many questions while they are in the showroom or counter sales, but I never give any answers.

Who am I? ____________________

10. I get to try out all our new appliances, but I never get to take them home with me.

Who am I? ____________________

11. I am a job entry level occupation who arranges and stores merchandise and plans to become a buyer one day.

Who am I? ____________________

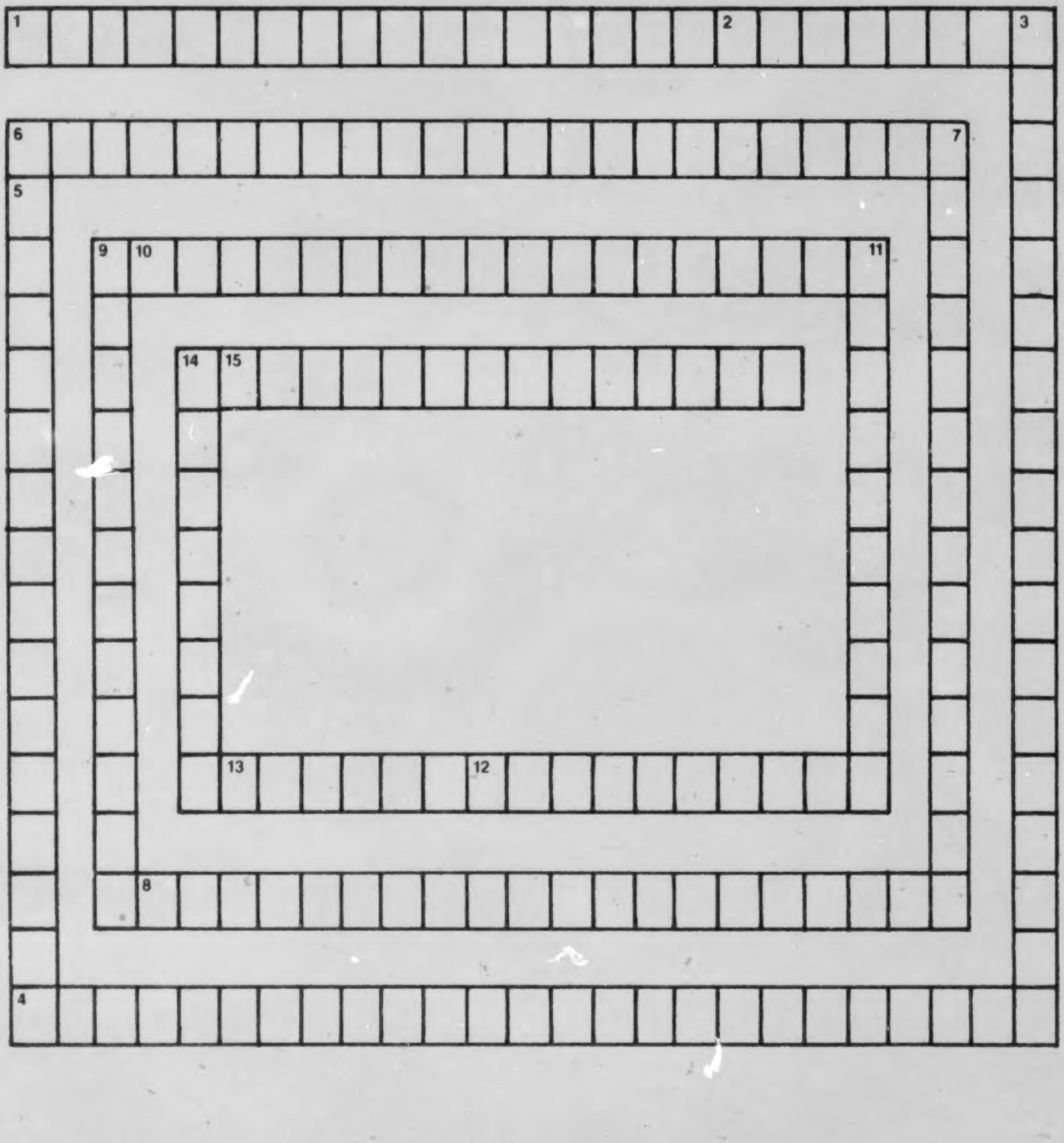
12. I have the luxury of trying all kinds of perfumes which I could never afford to buy.

Who am I? ____________________

BUYER'S TRAIL PUZZLE

#17

Read each description of buying activities on the next page and decide which buying career is explained. Write that career title in the numbered spaces of the puzzle form shown below.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BUYER'S TRAIL PUZZLE

#17

1. Supervises all buying activities and personnel.
2. Uses one of the senses (sight, taste, etc.) to determine the quality of a product.
3. Determines all merchandising policies, coordinates all merchandising activities, and consults with personnel in planning and implementing sales promotion campaigns.
4. Studies and interprets information gathered, makes recommendations concerning market conditions and business trends.
5. Orders merchandise for one type of merchandise carried by the business, such as sporting goods or women's dresses.
6. Handles orders and shipments of appropriate goods from the merchandise center to chain or branch stores.
7. Assists the head buyer in determining what merchandise to order; communicates closely with the sales personnel.
8. Conducts a survey in person of consumers to discover their preferences.
9. Assists the buyers and assistant buyers by providing information concerning stock turnover, oversees rotation of stock, and serves as a salesclerk or order dispatcher.
10. Investigates merchandise and promotional policies of a competitor's showroom or counter sales department.
11. Orders merchandise for a retailer for resale to consumers, coordinates buying personnel and activites.
12. Assists the customer in selecting goods, handles the sale and bagging.
13. Buys merchandise as an agent for a number of businesses.
14. Is responsible for unloading, arranging, and storing merchandise.
15. Inventories merchandise in stock by style, size, color, and other characteristics.

BUYER'S TRAIL PUZZLE—KEY

#17

^{1}P	U	R	C	H	A	S	I	N	G	M	A	N	A	G	E	R	^{2}S	A	M	P	L	E	R	^{3}M
																								E
^{6}M	E	R	C	H	A	N	D	I	S	E	D	I	S	T	R	I	B	U	T	O	R	^{7}A		R
^{5}S																						S		C
P		^{9}B	^{10}C	O	M	P	A	R	I	S	O	N	S	H	O	P	P	E	R	^{11}H		S		H
E		U																		E		I		A
C		Y		^{14}S	^{15}I	N	V	E	N	T	O	R	Y	C	L	E	R	K		A		S		N
I		E		T																D		T		D
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T		R		K																Y		T		E
Y		A		M																E		B		M
B		I		A																R		U		A
U		N		N	^{13}B	R	O	K	E	R	^{12}C	O	U	N	T	E	R	M	A	N		Y		N
Y		E																				E		A
E		E	^{8}P	E	R	S	O	N	A	L	I	N	T	E	R	V	I	E	W	E	R	R		G
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^{4}M	A	R	K	E	T	I	N	G	R	E	S	E	A	R	C	H	A	N	A	L	Y	S	T	R

BUYING RESOURCES FOR WHOLESALERS #18

Buying is not always glamorous and exciting. In deciding *what to buy*, the buyer must study past sales records of the business. Review customer want slips, shop his competitors, read trade papers, visit the markets, study available customer surveys, and check through current catalogs and price lists in order to buy the right goods.

After the buyer and his staff have done a great deal of research, a decision must be made concerning *how much to buy*. To help in making the decision, a *buying plan* is developed on the basis of money available for each type merchandise or materials, the assortment indicated by the research, and the supply that is available. He must also decide *when to buy* the merchandise to meet consumer demands and when it should be delivered according to season, climate, fashion.

The buyer's final buying decision is *where to buy*. Should he buy form a producer, another wholesaler, or an agent? Should he buy at national central market, a regional trade show, or from visiting salesmen? Or should he contract with a resident buying office at a central market to do his buying for a commission?

Buying for the wholesale business involves four major buying decisions:

a. *What to buy* – selection, quality suitability of goods

b. *How much to buy* – large quantities, small-lots, stock balance

c. *When to buy* – best time for purchase and receipt of merchandise

d. *Where to buy* – suppliers, buying offices, central markets, trade shows

The buying plan is the summary of decisions made concerning the purchase of merchandise for a business. It is based upon information that is assembled and analyzed by the buyer and/or purchasing manager. It includes what, how much, when, and where to buy merchandise. Buying plans in smaller businesses are usually prepared by management personnel in that firm. In large organizations with branch offices, the buying plan and most of the buying activities are handled at a central office.

In many wholesale businesses, much of the buying for the local warehouses entails reordering of basic stock items. This may be performed by supplier's salesmen or a warehouse manager. The basic stock items are generally determined by the central office buying staff.

Various resources are used by the buying staff to develop a buying plan and ultimately purchase goods to satisfy customers' needs and wants:

a. Sales records
b. Customer want slips
c. Trade publications
d. Company sales personnel
e. Comparison shopping studies
f. Marketing research surveys
g. Buyer's resource file
h. Supplier's sales force
i. Business / economic trends
j. Advisory consumer panels
k. Current media information
l. Product test or sampling results
m. Trade services
n. Market agency
o. Central market

To aid you in understanding some of the customer want and need resources that are used, the following explanations are provided:

RESOURCE FILE is an important source of buying information. It is a listing of years of experience and contains names and addresses of manufacturers, wholesalers, kinds of merchandise carried, price line, delivery information terms offered and so on.

BUYING PLAN helps the buyer to purchase the right amount of merchandise at the right time so that he will have a sufficient amount of merchandise to meet the demands of the customer. After the buyer determines his planned purchases, he has a guide to the amount that he is open-to-buy.

OPEN-TO-BUY is the amount of money that the buyer may spend during the balance of any period.

SALES RECORDS are used by the buyer to learn about the quantities, prices, sizes, colors, and styles of items sold in his business in the past.

PURCHASE ORDERS are used to advise the vendor in writing what type of merchandise is wanted. They contain the quantity desired, description of merchandise, shipping information, date merchandise is wanted, and terms of payment.

ADVISORY PANELS are groups of customers who provide the buying department opinions and suggestions about products and services of the wholesaler.

TRADE PUBLICATIONS are newspapers, magazines, and journals which keep the wholesalers informed about new trends and developments in his field. They are specifically written for the businessman, rather than consumers.

WANT SLIP tells the buyer what merchandise, not normally carried by the wholesaler, is being requested by the customers. Some salesmen turn want slips in by the week and some send them for a monthly collection. If this information is written down at the time of the request, it is much more accurate than relying on a salesman's memory.

CUSTOMER SURVEY is a method of questioning customers about the desirability of adding or dropping an item or even a whole line of merchandise. They can find out many other important things such as where to locate a branch warehouse, why a department's sales have fallen off, and how to make buying more convenient. These surveys can be made in person, on the phone or by mail.

PAST SALES RECORD is a record of how well an item has been sold in the past. It can be broken down into how fast it sold, how many were sold in each size, color, style, who made it, when it was carried and the price.

COMPARISON SHOPPING REPORT is made when either the buyer himself or a person appointed by him goes to competing businesses to gather information about the same products or similar ones which he carries. This helps the buyer plan his department better. It tells him what he needs to carry to make more sales than his competition is making.

COMPLETE THE FOLLOWING:

What are the four major wholesale buying decisions that must be made?

1. ______________________
2. ______________________
3. ______________________
4. ______________________

What are some sources that the wholesale buyer may use in making decisions?

1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________

"A BETTER MOUSETRAP" #18

Starr Wholesaler's Testing Laboratory has received from Schultz Co., a manufacturer of rodent exterminating products, a new plastic mouse trap for testing. The Laboratory finds that the plastic trap compares to the old fashioned wooden one in the following ways:

1. It is 20% stronger.
2. It is 15% lighter weight so will cost less to ship.
3. It is 10% less in cost.
4. It comes in 4 attractive colors.

As a result of these tests, John Swan, the buyer, is enthusiastic about this new product and decides that he can profitably sell 100 gross to retailers at 7 cents each as compared to the 10 cents he had to charge for wooden mouse traps. Therefore, he buys the 100 gross of the traps, and the company salesmen find that they are enthusiastically received by their dealer customers. But when they call back a second time after the traps have been delivered, the dealers inform them that they can't sell them.

Questions:

1. Was the buyer, John Swan, wise to use only the testing results as the standard in making his buying decision?
2. What else did he need to know?
3. How can he find all that he needs to know?
4. Why do you think that the consumers would not buy the plastic traps?

Case Studies

A. Mark Smith, as a salesman for Starr Wholesaler's is told by the buyer at Never's Hardware that his last shipment of nails which were broken down into one pound packages did not meet the needs of 30% of his customers who wanted to buy smaller quantities of nails.

B. Starr Wholesaler's salesman, John Powers, reports to the buyer that he had 20 calls last week for Stilson Pipe Wrenches from the retailers in his territory, and that he did not have the products in his line.

C. Salesman Russell Spencer lost 6 sales last week in his territory for Starr's $59.95 lawn mowers because retailers told him his price was too high.

Questions:

1. What 3 things has the buyer learned from this feedback from the firm's salesmen?
2. What should the buyer do in each instance?

BUYING TIME

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Deciding the packaging and labeling for the product to be purchased.

TIME TO ______________

TIME TO ______________

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Placing the order for a new product.

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11

Gathering data and conducting surveys.

TIME TO ______________

TIME TO ______________

12
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11

Developing a marketing plan for the newly purchased product.

DIRECTIONS: Tell what step in purchasing a new product the definition by each clock is explaining by filling in the blank with the correct step and drawing an hour hand (short hand) indicating the number of the step it is in the new product buying procedure.

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TIME TO ______________

Checking to see if the new product meets the standards of other products sold by the wholesaling firm.

COMPARISON SHOPPING SURVEY

#19

Competitor's Name ____________ Business Location ____________

Department ____________ Date of Visit ____________

Kind of item	Brands shopped	Prices	Styles	Sizes

CONCLUSIONS:

RECOMMENDATIONS:

THE WHOLESALER

(Comparison Shopper's Signature)

#20

CUSTOMER WANT SLIP

THE WHOLESALER

Date ____________ Dept. ______________ Clerk ______________

Merchandise Description	Style	Sizes	Color	Price

Customer's Name ____________________ Phone Number ______________

Address ____

#21

BUYING RESOURCE FILE CARD

Dept.	House No.	Name of Resource	Address	Terms

Style No.	Description	Cost	Price	Quantity Rec'd	Date	No. Redc.	% Redc.

SALES RECORD

Date

Dept.

Vendor No.	Manufacturer	Style No.	Class	Retail Price		Color	Size	Cumulative		On Order
								Units Sold	Units Rec.	

#22

STUDYING THE SALES REPORT # 23

Department: Sporting Goods
Date: January–December, 1974
Product: Bicycles

	BOY'S	GIRL'S	TOTAL
Size			
24 inch	18 doz.	14 doz.	32 doz.
26 inch	46 doz.	40 doz.	86 doz.
total	64 doz.	54 doz.	118 doz.
Color			
Blue	48 doz.	20 doz.	
Red	16 doz.	34 doz.	
Gears			
Three	15 doz.	22 doz.	
Five	28 doz.	24 doz.	
Ten	21 doz	8 doz.	
Price			
$39.50–49.50	26 doz.	34 doz.	
52.50–69.50	38 doz.	20 doz.	
Seats			
Banana	40 doz.	16 doz.	
Regular	24 doz.	38 doz.	
Handlebars			
Raised	28 doz.	18 doz.	
Lowered	22 doz.	4 doz.	
Regular	14 doz.	32 doz.	

Questions:

1. Based on this information, describe the most popular boy's bicycle.
2. Based on this information, describe the best seller in girl's bicycles.

ANALYSIS OF WANT SLIPS

#24

Department: Sporting Goods
Date: January–December, 1974
Product: Bicycles
Total number of want slips filed: 80

	BOY'S	GIRL'S	TOTAL
Size			
18 inch	4	8	12
24 inch	14	12	25
26 inch	22	10	32
Total	40	30	70
Color			
Blue	26	12	
Red	14	28	
Gears			
None	1	2	
Three	4	17	
Five	13	11	
Ten	22	10	
Price			
$39.50–49.50	15	28	
52.50–69.50	25	12	
Seats			
Banana	25	12	
Regular	15	28	
Handlebars			
Raised	15	13	
Lowered	24	1	
Regular	1	26	

Questions

1. Based on the information, describe the boy's bicycle sought most frequently.
2. Based on the information, describe the girl's bicycle sought most frequently.
3. Compare with descriptions given from review of sales records.

COMPLETING A PURCHASE ORDER

#25

1. Compute the amount of payment due less discount (if any) and the due date for the following:

   (a) 2/15 EOM Invoice totals $150. Merchandise received on October 18.

   (b) 4/10 ROG Invoice totals $400. Merchandise received on November 2.

   (c) COD Invoice totals $300. Merchandise received September 15.

2. Complete the purchase order below:

THE WHOLESALER
2104 Bay Boulevard
Spring Lake, Florida 34917

Ordered from:
Flicks, Inc.
72 New Way Road
Billsville, New Jersey

Terms: 3/15 ROG

Item	Quantity	Unit Cost	Total Cost
Pipes	10 doz.	$4.00	
Zodiac posters	8 doz.	.50	
Beads	9 doz.	2.00	
		TOTAL COST OF ORDER	
		Less discount	
		Total Amount Due	

DEALER WANT SLIP – CAMPER COLD STORAGE #26

The Wholesaler		Date	Dept.	Clerk No.	
Quantity	Merchandise	Price	Style	Color	Size

Name ____________________ Phone ____________

Address ________________________________

The above form is called a customer ____________ ____________.

Fill it in with the information from the paragraph below.

> On November 20, 1974, a counterman (clerk 228) at The Wholesaler's Counter Sales Department was asked for an item *not* carried in the regular warehouse. The item wanted is an 18-inch brown camper refrigerator that operates on bottled gas and retails for about $100.

When this request reached the Specialty Buyer, he decided that since there had been previous requests for this item he would take it to the Head Buyer. They decided to gather more information before making any recommendations to the Purchasing Manager.

What resources could the buyers use in making their buying decisions? What buying decisions will have to be made?

BUYING RESOURCES	*BUYING DECISIONS*
____________	____________
____________	____________
____________	____________
____________	____________
____________	
____________	

DEALER RESEARCH SURVEY – CAMPER COLD STORAGE #27

1.	Do your customers prefer:	Refrigerator ________	44
		Ice box ________	52
2.	If you checked refrigerator, which fuel do they want?	Electric (battery) ________	73
		Bottled gas ________	23
3.	What size do they prefer?	16 inch ________	54
		18 inch ________	29
		20 inch ________	13
4.	Do they prefer a freezer compartment?	Yes ________	23
		No ________	73
5.	What type of finish do they prefer?	Safety ________	85
		Regular ________	11
6.	Which price range do they prefer?	$ 50 to $100 ________	23
		101 to 150 ________	11
		151 to 200 ________	62
		201 to 250 ________	00

The figures in the right column above are the responses received on the survey that was conducted. The above responses made by customers selling camping equipment persuade you, the wholesale buyer, to check your resource file.

SOURCE NO. 1

Robbins Manufacturing Co. of Atlanta, Ga. will give you a 5% quantity discount and can deliver usually in 60 days from the time the merchandise is ordered. This is a large manufacturing company carrying a full line of prices and styles in large appliances.

SOURCE NO. 2

AP–RITE Corp. of Minneapolis, Minn. usually delivers in 60 to 90 days. A 4% discount is offered. This is a medium sized manufacturer with an emphasis on appliances for the household and business use.

Based upon the information given, show your buying decisions in the spaces below:

1. From which company would you order the cold storage unit?

____

2. Which two styles of cold storage units would you carry in the warehouse?

____

PURCHASING THE GOODS

#28

Based on a review of previous sales records, customer surveys, want slips, and comparison shopping records, the buyer has determined that the following merchandise should be ordered for the Sporting Goods Department:

> 9 doz. fiber glass fishing rods @ $8.00 each; 6 doz. mahogany fishing rods @ $8.00 each; 4 doz. open-face fishing reels @ $15.00 each; 9 doz. closed-face spinning reels @ $15.00 each; 8 doz. two-drawer tackle boxes @ $3.00 each; 6 doz. life jackets @ $8.00 each. The order is to be placed with APEX Manufacturing Company, 1124 Lake Shore Drive, Chicago, Illinois 62304, and is to be shipped by United Van Lines. The terms are to be 2 / 10 EOM.

Complete the purchase order according to the information given above.

Date:
Ordered from:

Terms:
Shipped by:

Item	Description	Quantity	Unit Cost	Total Cost

THE WHOLESALER 2104 Bay Boulevard Spring Lake, Florida 34917	TOTAL COST OF ORDER	
	Less Discount	
	Total amount to be paid 10 / EOM	

WHO WANTS THE REAL THING?

Starr Wholesaler's Inc. Sales Report Date: August thru January

Product: Artificial Xmas Trees Resource: J. Black & Sons

Monthly Sales	Aug. (in doz.)	Sept. (in doz.)	Oct. (in doz.)	Nov. (in doz.)	Dec. (in doz.)	Jan. (in doz.) @ ½ price	TOTALS (in doz.)	PURCHASES (in doz.)
4-foot trees	36	42	64	206	150	30	528	700
6-foot trees	24	36	42	126	75	10	313	500
8-foot trees	20	28	34	84	40	4	210	300
TOTAL	80	106	140	416	265	44	1051	1500
Green trees	59	84	100	340	199	38	820	1000
Silver trees	21	22	40	76	66	6	231	500
TOTAL	80	106	140	416	265	44	1051	1500

Questions

1. In which month does the wholesaler sell the largest number of trees? ____________
2. How many trees were sold at the regular price? ____________
3. Can you explain why more green trees were sold than silver ones? ____________
4. Which height tree is the most popular? ____________
5. How will the information on this sheet aid the buyer when he plans his purchases of artificial trees for next season? ____________

#29

Starr Wholesaler's, Inc. **Stock Record** **Date: August 1 thru February 1**

Product: Artificial Xmas Trees Resource: J. Black & Sons

DATE RECEIVED		STOCK ON HAND							ITEM
Feb. 1 (doz.)	Aug.1 (doz.)	Aug. 1 (doz.)	Sept.1 (doz.)	Oct.1 (doz.)	Nov. 1 (doz.)	Dec. 1 (doz.)	Jan. 1 (doz.)	Feb. 1 (doz.)	
200	500	200	664	622	558	352	202	172	4-ft. trees
200	300	200	476	440	398	272	197	187	6-ft. trees
100	200	100	280	252	218	134	94	90	8-ft. trees
500	1000	500	1420	1414	1174	758	493	449	TOTALS
250	750	250	941	847	757	417	218	180	Green
150	350	150	479	457	417	341	275	269	Silver

Questions:

1. Assuming that the Xmas trees on hand on February 1 will go into storage until August 1, and with the following planned sales for fall, how many artificial Xmas trees will the buyer need to buy?

Planned Sales

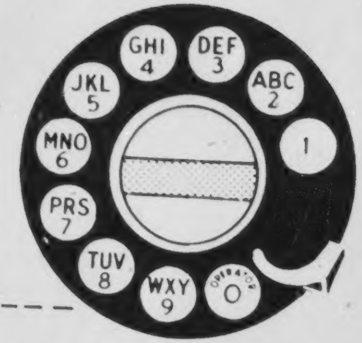
4-ft. Xmas trees – 600 doz.
6-ft. X-mas trees – 400 doz.
8-ft. Xmas trees – 250 doz.

2. Do you think the buyer would be wise to drop silver trees from his line, or should he buy more in hopes that next year they will be more popular?

#29

"SELLING CAREER PLEASE"

Using the numbers on the telephone dial, uncode each of the number groups below to reveal a personal selling career. Remember, each number represents three letters. For example, "2" could be the letter A or B or C. A few numbers have been revealed to help you.



Job Entry

1. 2274437 — _ _ _ H _ _ R
2. 7253725375 — _ _ L _ _ C _ _ _ K
3. 78625626 — _ _ _ C _ M _ _
4. 2679974837 — C _ _ _ _ R _ _ _ _
5. 45587872867 — _ L _ _ _ T _ _ _ _ _
6. 7446/974837 — _ I _ _ / _ R _ _ _ _
7. 3477529/277478268 — D _ _ _ L _ _ / _ S _ _ _ T _ _ _

Advanced Career

8. 837748679/72537626 — _ E _ _ _ _ O _ _ / _ A _ _ S _ _ N
9. 23/529688/626 — _ D / A T / A
10. 76883626 — _ O _ _ _ M _ _
11. 2686837 — _ _ U _ T _ _
12. 3477529/277362537 — D _ _ _ L _ _ / _ S _ _ M _ _ _ _
13. 3477529/33744637 — _ I _ _ _ A _ / D _ _ _ G _ _ _
14. 3477529/626 — _ _ S _ _ _ Y / _ _ N
15. 67337/34777282437 — O _ _ _ R / _ / _ I _ _ A _ _ _ E _

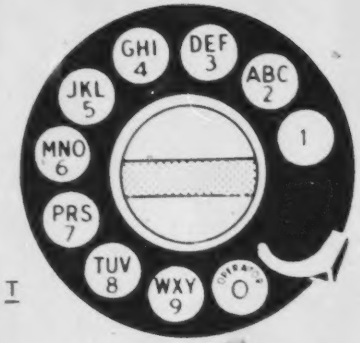
Management / Specialist

16. 23837847464/626 — _ D _ _ _ T _ _ _ N _ / M _ _
17. 782542/735284667/626 — _ _ B _ _ C / _ E _ _ T _ O _ _ / _ A _
18. 4363725/6262437 — _ _ N _ _ _ L / _ A _ _ G _ _
19. 76883/7873784767 — R _ _ T _ / _ _ P _ _ V _ _ O _
20. 72537/6262437 — _ _ L _ _ / M _ _ A _ _ _
21. 72537/36446337 — S _ _ _ _ E _ _ _ N _ _ R
22. 773242589/72537626 — _ P _ _ I _ _ _ Y / _ A _ _ _ M _ N
23. 72537·7378423/7873784767 — _ A _ _ S _ E _ _ I _ _ / _ U _ _ _ V _ _ O _

#30

"SELLING CAREER PLEASE" – KEY

Using the numbers on the telephone dial, uncode each of the number groups below to reveal a personal selling career. Remember, each number represents three letters. For example, "2" could be letters A, B, or C. A few numbers have been revealed to help you.



Job Entry

1. 2274437	CASHIER
2. 7253725375	SALESCLERK
3. 78625626	STOCKMAN
4. 2679974837	COPYWRITER
5. 45587872867	ILLUSTRATOR
6. 7446/974837	SIGN/WRITER
7. 3477529/277478268	DISPLAY/ASSISTANT

Advanced Career

8. 837748679/72537626	TERRITORY/SALESMAN
9. 23/529688/626	AD/LAYOUT/MAN
10. 76883626	ROUTEMAN
11. 2686837	COUNTER
12. 3477529/277362537	DISPLAY/ASSEMBLER
13. 3477529/33744637	DISPLAY/DESIGNER
14. 3477529/626	DISPLAY/MAN
15. 67337/3477282437	ORDER/DISPATCHER

Management/Specialist

16. 23837847464/626	ADVERTISING/MAN
17. 782542/735284667/626	PUBLIC/RELATIONS/MAN
18. 4363725/6262437	GENERAL/MANAGER
19. 76883/7873784767	ROUTE/SUPERVISOR
20. 72537/6262437	SALES/MANAGER
21. 72537/36446337	SALES/ENGINEER
22. 773242589/72537626	SPECIALTY/SALESMAN
23. 72537-7378423/7873784767	SALES-SERVICE/SUPERVISOR

SELLING FOR A WHOLESALER-DISTRIBUTOR #31

Selling is an essential link between the wholesaler of goods and the business user or consumer. Selling is the process of assisting or persuading a customer to make a wise buying decision to meet his needs or wants for a good or service.

Personal selling involves a direct face-to-face or telephone contact with a customer during the sales process.

Customer services are extra services provided by the wholesaler to its customer to support the sale of merchandise. Customer services are utilized to help establish the business' reputation, create goodwill with its customers, encourage patronage of the business, as well as promote the sale of specific products.

Customer services involve personnel in all areas of the wholesale business and are classified into five main categories:

Customer Credit Services – allow the customers to purchase merchandise in exchange for a promise to pay for them later.

Merchandise Handling Services – sales-supporting activities involved in the order or follow-up of a sale for goods.

Customer Accommodations Service – sales-supporting activities which help customers get the maximum satisfaction from the goods they buy.

Information/Advisory Services – assistance provided to customers about the selection, promotion, and use of merchandise.

Customer Shopping Conveniences – special services offered to increase goodwill and patronage of the wholesaler.

Sales promotion supplements personal selling of products by the use of special methods to inform and persuade prospective customers to buy a particular product from a wholesaler.

Sales promotion includes four major areas of advertising, display, special promotional techniques, and public relations/publicity.

a. *Advertising* is any paid form of non-personal presentation of ideas, goods, or services by printed or audio-visual means for an identified sponsor. Advertising methods or media used include radio, television, newspapers, direct mail, billboards, and handbills.

b. *Display* is any means of visually showing merchandise, often as it would be used, within or around a business to attract customers' attention and create interest in buying the displayed goods. Methods of display include window, counter, floor, wall, ledge, ceiling, island, and point-of-purchase displays.

c. *Special promotional techniques* are used during a sales promotion campaign to create extra attention interest in the product and/or business. Often planned and prepared by advertising personnel, the special promotional methods or techniques used include contests, samples, demonstrations, sweepstakes, and exhibits.

d. *Public relations and publicity* are any means used to develop a favorable public image of a business or create goodwill. Some of the methods or activities include news releases, sponsoring local youth teams or clubs, supporting community events, and the like.

Many wholesaling career opportunities are available in selling for people who provide information and services, promote the product, as well as for those who actually sell the merchandise.

Outside salesmen, specialty salesmen, and sales engineers are highly skilled sales-service personnel who usually begin their careers with three to five years experience in the warehouse to learn the merchandise and the business operation.

Some of the selling career opportunities available in wholesaling according to their career levels are:

JOB ENTRY

Cashier	works in counter sales department handling exchange of money, ringing up sales, writing orders.
Copywriter	obtains the necessary information about the products or business and prepares the original copy for an advertisement.
Illustrator	creates a picture or design to favorably show a product or the business described in the copy of an advertisement
Salesclerk	arranges, straightens, and prices merchandise in the counter sales area; assists customers in selecting and locating merchandise.
Sign Writer	creates by hand or machine any necessary display showcards, posters, signs, or other visual promotional aids.
Display Assistant	orders materials and supplies for the display man; keeps an inventory of all props, trimmings, tools, etc.; checks display signs and cards for accuracy.

ADVANCED CAREER

Auctioneer	provides information about merchandise to a group of customers, opens and closes offers (bids) made to buy.
Counterman	assists customers in determining goods (often parts or supplies) that are needed, obtains or orders the merchandise from the warehouse, and completes the sale.
Ad Layout Man	assembles all of an advertisement's parts into attention-getting, attractive presentation for a product or business
Display Assembler	designs, develops, and constructs special displays, such as point-of-purchase displays, props, and trimmings.
Display Designer	creates and plans the displays on a drawing board based upon information from the display manager and sales personnel.
Display Man	arranges the merchandise and props into an attractive design as created by the designer; in smaller businesses he may assume the roles of the designer, technician, trimmer, and the sign writer.
Territory Salesman	sells and services business customers for a certain region in the wholesaler's service area.
Routeman	sells and delivers merchandise from a truck to customers in a certain area on a regular basis.
Rack Salesman	sells, services, and delivers merchandise to retail customers.
Counter	inventories the stock of retail customers and writes orders for replacement of basic stock.

MANAGEMENT/SPECIALIST

General Manager	top executive of a retail business who supervises and coordinates all activities and personnel within the business.
Route Supervisor	oversees all activities of route sales and deliveries of goods to business customers.
Sales Manager	hires, fires, trains, and supervises all sales personnel for the business.
Advertising Man	plans advertising program for a business and its products in conjunction with the sales manager; develops such items as brochures, handbills, etc.; in smaller businesses serves as the liaison with an advertising agency for development of the necessary promotional plans.
Public Relations Man	plans and promotes programs to favorably promote publicity and goodwill for a business.
Sales Engineer	provides technical knowledge and skills as a special service to customers.
Sales-Service Supervisor	coordinates activities of inside counter sales personnel, including countermen, salesclerks, and cashiers.
Specialty Salesman	sells and services specific products carried by a wholesaler throughout its service area.

Case Study

Mr. Jones is the owner of a drugstore in a medium-size city in a neighborhood shopping area. Most of his customers live in the area and are in the store on the average of twice a week. They buy toys, candy, have prescriptions filled, and buy gifts.

Jim James is a salesman for Starr Wholesalers and calls on Mr. Jones once a month. He has a good buy on plastic models if the customer buys 12 dozen (one gross). He knows that Mr. Jones usually buys two dozen a month.

Discuss whether he should sell this "deal" to Mr. Jones. Why?

Customer Services

Utilizing the information provided in the following Case Study, answer the four questions.

Montgomery Hardware has returned to your warehouse a half-filled case of random size nails which they state was delivered to them in poor condition and without size or quantity information provided. Along with the case they have sent a bill for $3.78 which they state your firm owes them for freight charges.

1. Should you pay the bill? Why or why not?

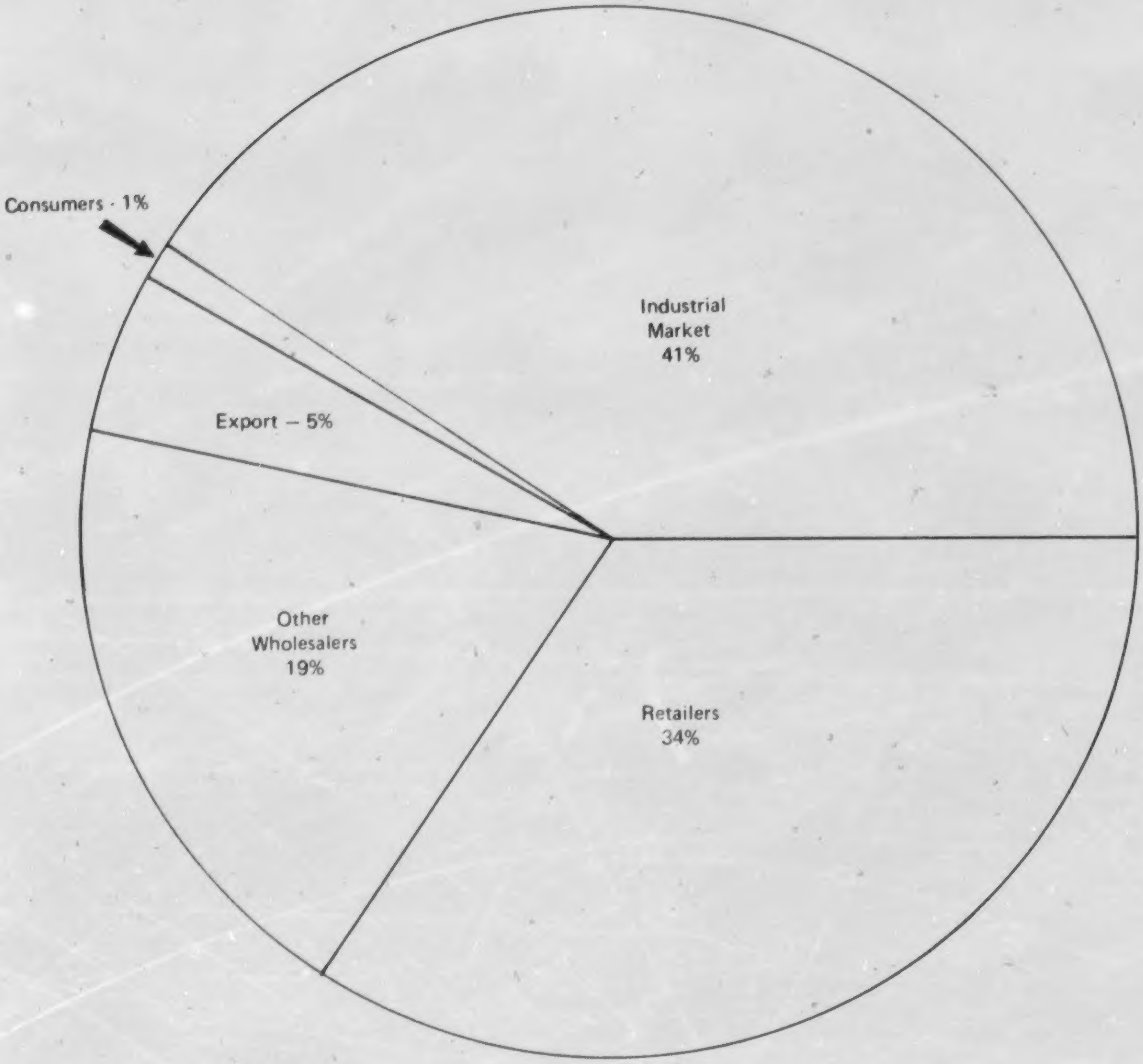
2. What two factors should be reasoned out in this type of situation?

3. How could this problem be eliminated so as not to reoccur?

4. Should you send another case of nails to Montgomery Hardware immediately? Why or why not?

5. What other customer services can a wholesaler provide his customers besides exchanges, returns, or adjustments?

SALES MARKETS OF WHOLESALERS



SITUATIONS IN SELLING

#32

1. Tod Drake, the sales-service manager for Brewster's Wholesale Company, noticed one of his new entry level salesclerks accepting a cash payment from a customer and putting the money in her jacket pocket. How would you handle this situation?

2. Belinda is a cashier at the job entry career level for a cash and carry grocery distributor. A customer has just bought a large order of groceries and returned from her car to say that you shorted her $10.00. What would you do?

3. Mark is an advanced career counterman for an auto parts supply company. The counter sales department is very busy today because you are running a special on spark plugs. You approach one customer who seems interested in some hub caps. The man standing next to her says, "Listen, I've been waiting for a half an hour. I was here long before this gal." How would you take care of this situation?

4. Being in a management position, Mr. Davis, the route supervisor for a dairy products company has called his monthly meeting with his advanced career routemen. Last month the general manager of the company asked him to hire his son to work as a routeman. Mr. Davis took Joe on, but has a morale problem developing with other men. The boss' son comes in late, leaves early, and has missed some of his deliveries. Mr. Davis has talked to him several times with no success. Several routemen have said they are going to say something in the meeting if something isn't done. What would you do?

5. Robert is a specialist career sales engineer for a large building supplies-hardware wholesaler. While working with one of their biggest contractor customers, Robert discovered that the contractor was not meeting building specification laws. If you were Robert, what would you do?

SALES CAREER STUMPER* #33

Each of the 25 circles below represents a sales promotion career. Can you connect twelve of the circles with one continuous line to form a cross of 3 advertising, 3 display, 3 publicity, and 3 special promotion careers?

Copywriter	Cashier	Illustrator	Auctioneer	Display Designer
Layout Man	Counterman	Territory Salesman	Routeman	Advertising Man
Order Dispatcher	Rack Salesman	Display Man	Counter	Sales Manager
Sign Writer	Sales Clerk	Advertising Man	Promotion Director	Specialty Salesman
Display Assembler	Sales-Service Supervisor	Sales Engineer	Display Assistant	Public Relations Man

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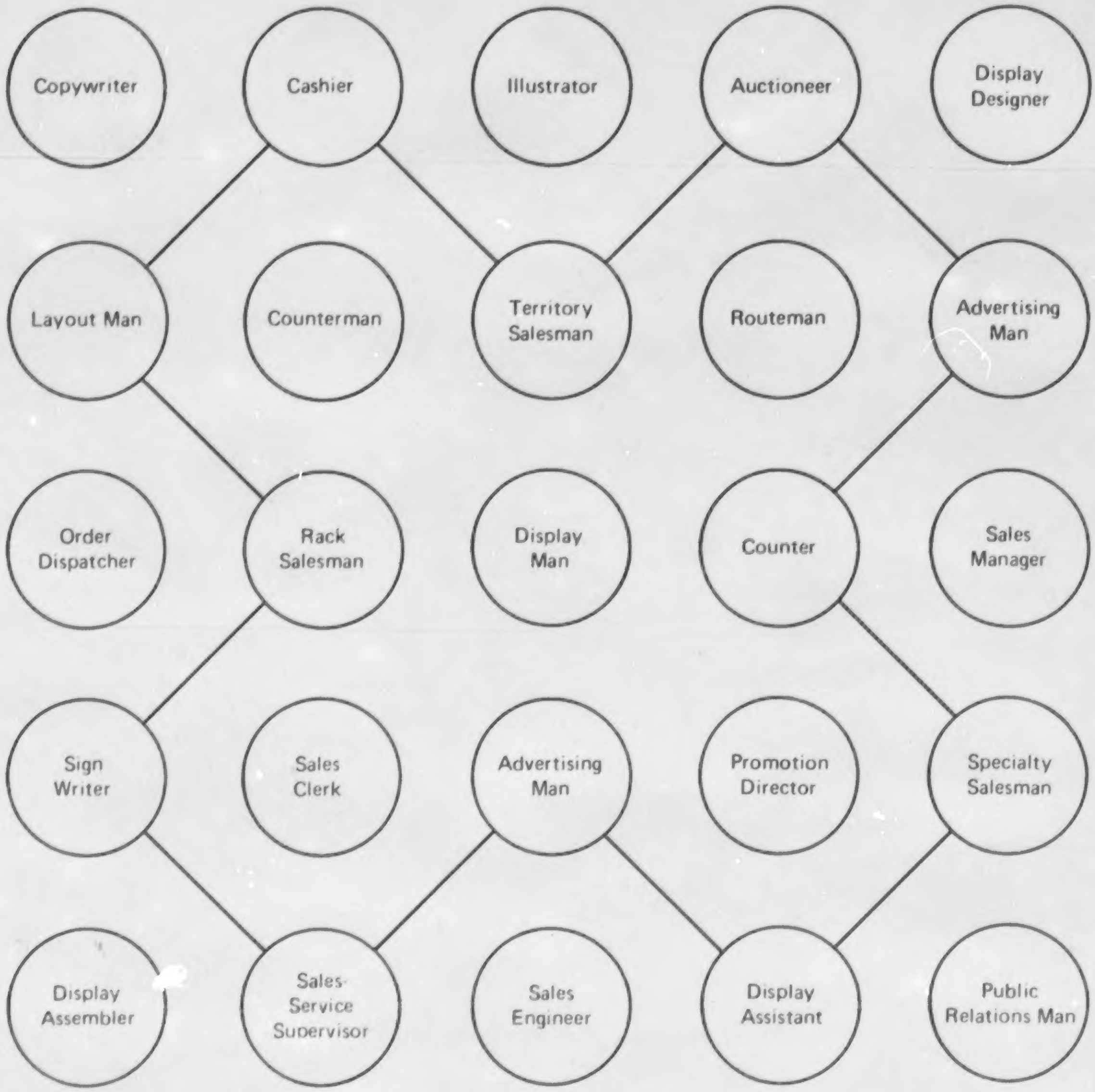
SALES CAREER STUMPER – KEY

#33

Each of the 25 circles below represents a sales promotion career. Can you connect twelve of the circles with one continuous line to form a cross of 3 advertising, 3 display, 3 publicity, and 3 special promotion careers?


Copywriter
Cashier
Illustrator
Auctioneer
Display Designer
Layout Man
Counterman
Territory Salesman
Routeman
Advertising Man
Order Dispatcher
Rack Salesman
Display Man
Counter
Sales Manager
Sign Writer
Sales Clerk
Advertising Man
Promotion Director
Specialty Salesman
Display Assembler
Sales-Service Supervisor
Sales Engineer
Display Assistant
Public Relations Man

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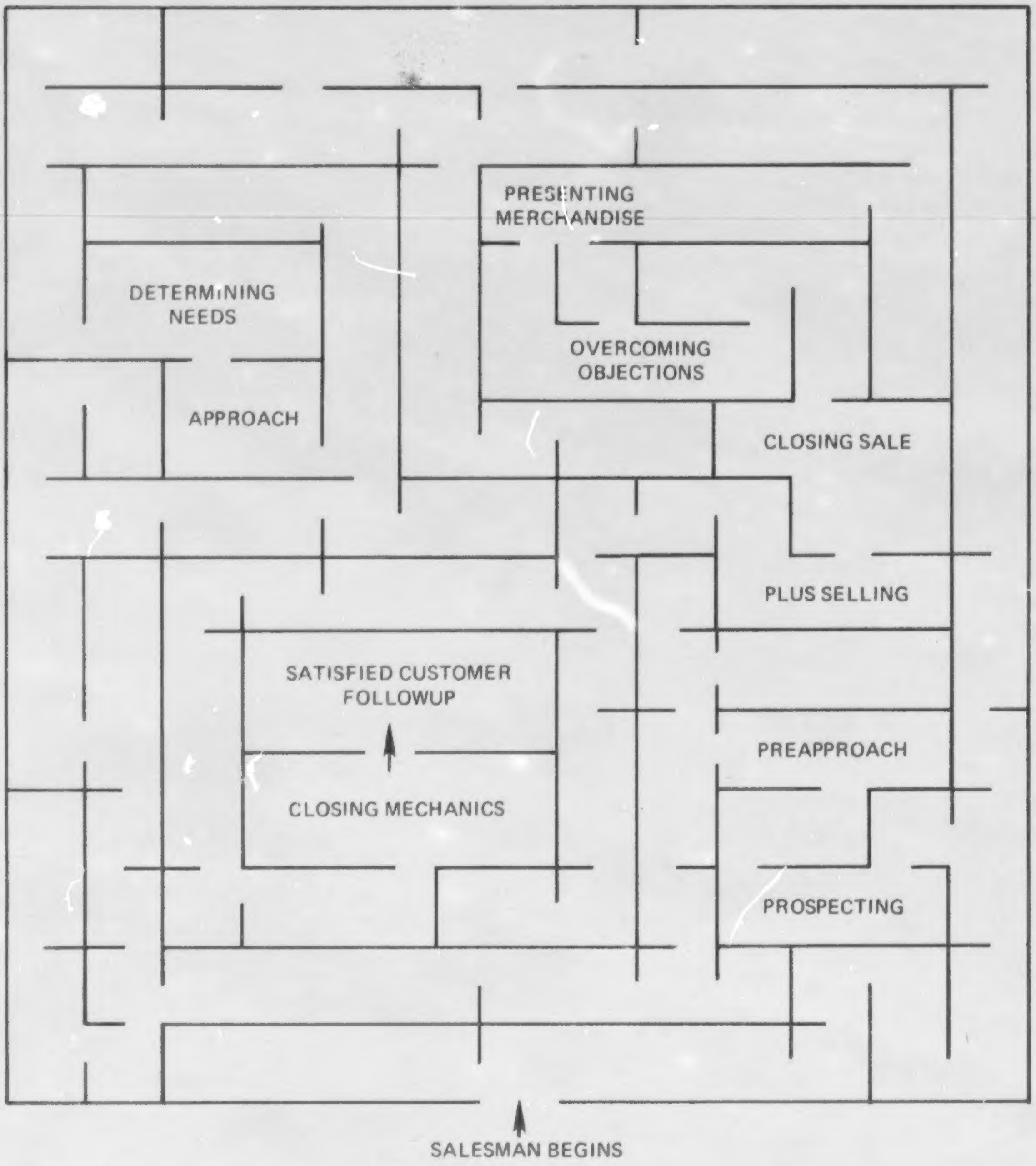
STEPS IN WHOLESALE SELLING* #34

1. Follow the maze – see if you can make the sale and satisfy the customer.
2. On a separate piece of paper, write down ten steps you went through in completing the sale to satisfy the customer as an effective salesman.


PRESENTING MERCHANDISE
DETERMINING NEEDS
OVERCOMING OBJECTIONS
APPROACH
CLOSING SALE
PLUS SELLING
SATISFIED CUSTOMER FOLLOWUP
PREAPPROACH
CLOSING MECHANICS
PROSPECTING
SALESMAN BEGINS

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SELLING SPIRAL

35

Can you fill in the steps a salesman* should follow in conducting a sale? Read each of the clues below and write the correct terms in the blanks provided on the following pages. Remember, some of the terms are more than one word.

1. Process of seeking and finding possible customers
2. Procedure of obtaining information about your prospect and product
3. Greeting the customer and opening the sale
4. Finding out how, for what, and by whom the product is to be used
5. Explaining and showing the product as it would be used
6. Emphasizing the benefits of the product and services of the seller
7. Bringing the customer to a positive buying decision
8. Attempting to sell the customer higher quality or additional goods
9. Completing the sales transaction by writing a purchase order, ringing up a sale, etc.
10. Contacting the customer at a later date to determine his satisfaction and offer additional services

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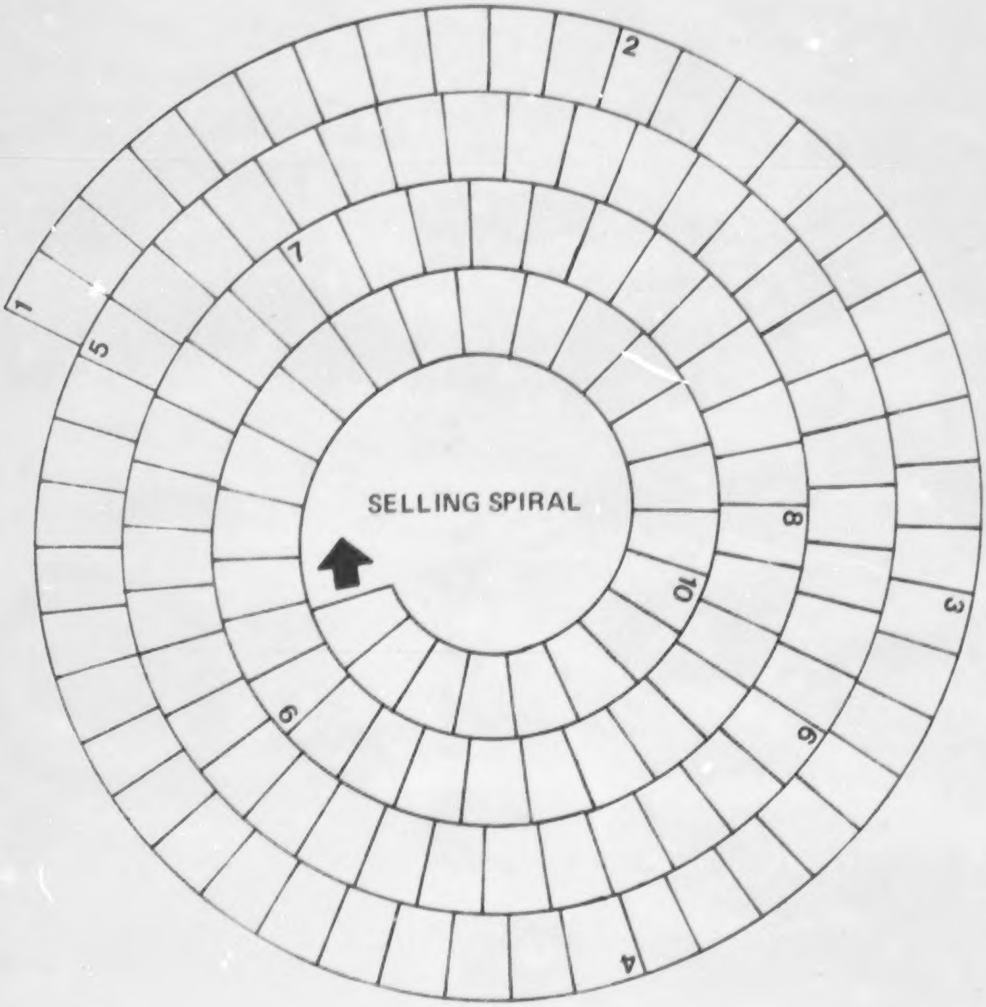
SELLING SPIRAL*

A good salesman takes ten steps in satisfying his customer's needs and completing a sale. Read each of the descriptions on the previous page and write the correct term in the spaces of the spiral puzzle below. The steps are in the correct order in which a salesman would perform them in serving his customer.



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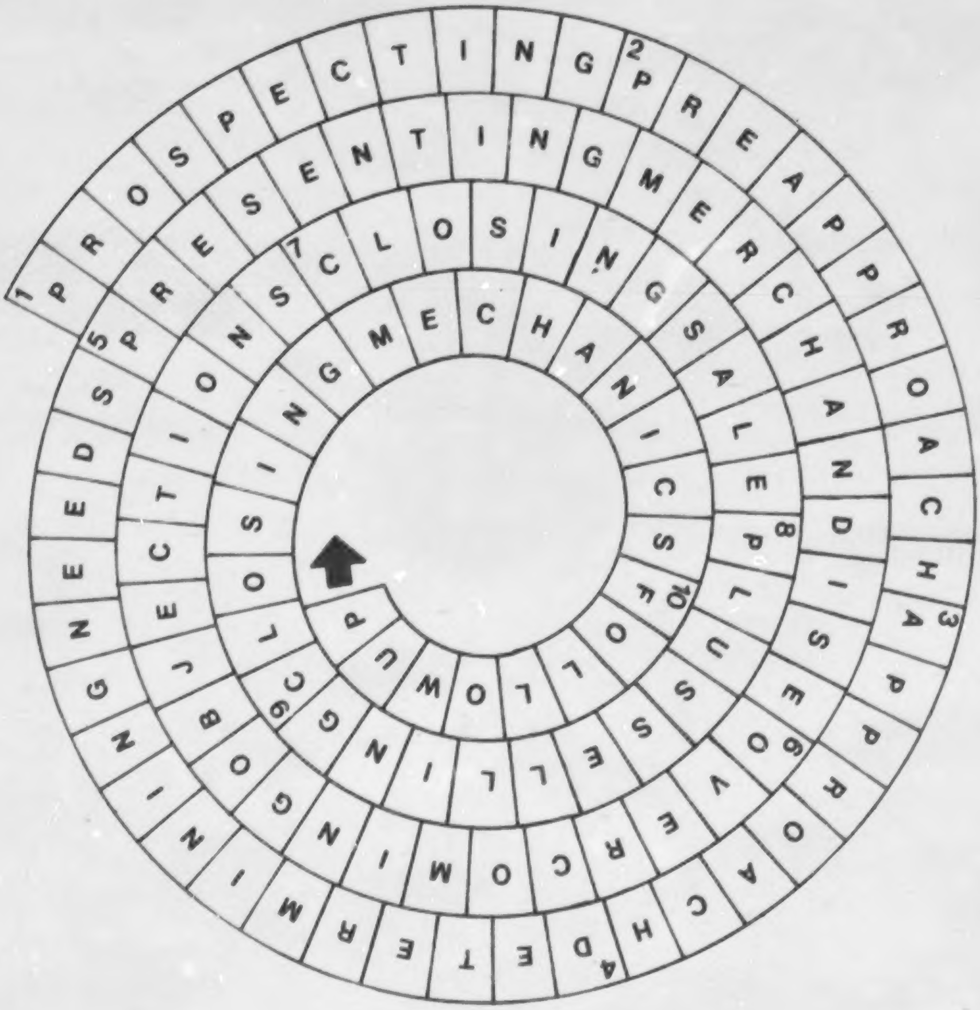
SELLING SPIRAL–KEY*


1 PROSPECTING
2 PREAPPROACH
3 APPROACH
4 DETERMININGNEEDS
5 PRESENTINGMERCHANDISE
6 OVERCOMINGOBJECTIONS
7 CLOSINGSALE
8 PLUSSELLING
9 CLOSINGMECHANICS
10 FOLLOWUP

---

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SATISFYING STEPS IN SELLING

36

An effective salesman takes ten steps in satisfying his customer and completing the sale:

Prospecting	process of seeking and finding possible customers.
Preapproach	procedure of obtaining information about your prospect and product.
Approach	greeting the customer and opening the sale.
Determining Needs	finding out how, for what, and by whom the product is to be used.
Presenting Merchandise	explaining and showing the product as it would be used.
Overcoming Objections	emphasizing the benefits of the product and services of the seller.
Closing Sale	bringing the customer to a positive buying decision.
Plus Selling	attempting to sell the customer higher quality or additional goods.
Closing	completing the sales transaction by writing a sales slip, ringing up a sale, etc.
Follow-Up	contacting the customer at a later date to determine his satisfaction and offer additional service.

In addition, sales personnel perform a number of sales-supporting activities. Some of these include:

Keeping displays and sales areas clean and neat.
Filling display racks and counters with reserve stock merchandise.
Completing want slips for requested products.
Totaling daily sales and checking against sales slips and cash drawer.
Requesting stock from the storeroom or warehouse.
Covering or moving merchandise when the business closes for the day.

CLOSING MECHANICS

Nelson receives $30.00 from a customer who has purchased the following items: a tennis racket for $14.95; a racket cover for $3.95; a can of tennis balls for $2.95; a tennis book for $1.25. Complete the sales slip provided using a state sales tax of 4%. Figure the smallest amount of change that Nelson can give his customer using the cash drawer shown as a reference. Place the number of coins and bills in the blanks provided.

$30.00 Amount given by customer

– ______ Total amount of purchase

$ Change due to customer

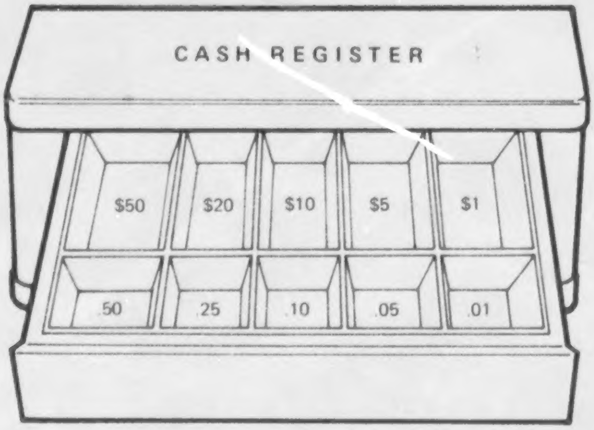
THE WHOLESALER

CUSTOMER ORDER NO.	SALESMAN	DATE
SOLD TO		
ADDRESS		
SHIP TO		

CASH	C.O.D.	CHARGE	CREDIT	MDSE. RET'D	PAID OUT

Quantity	DESCRIPTION	PRICE	AMOUNT
		TAX	
		TOTAL	

ALL CLAIMS AND RETURNED GOODS MUST BE ACCOMPANIED BY THIS BILL



Pennies	.01	
Nickels	.05	
Dimes	.10	
Quarters	.25	
Half Dollars	.50	
One Dollar	$1	
Five Dollars	$5	
Ten Dollars	$10	

TOTAL CHANGE $

WHOLESALE SELLING PUZZLER

#37

Change the order of the letters in the left column to reveal the ten major steps involved in personal selling.

1. GROPSPECNIT ____________________
2. REHPAPORACP ____________________
3. HAPROCAP ____________________
4. TEDREMGININ/DENES ____________________
5. REPNESGINT/REMHANCISED ____________________
6. REVOMOGCIN/JOBTECSION ____________________
7. SLOGCIN/LEAS ____________________
8. SLUP/GINLSLE ____________________
9. NOCLSIN/CHEMANICS ____________________
10. PUFOLWOL ____________________

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#37

WHOLESALE SELLING PUZZLER - KEY*

Change the order of the letters in the left column to reveal the ten major steps involved in personal selling.

1. GROPSPECNIT	PROSPECTING
2. REHPAPORACP	PREAPPROACH
3. HAPROCAP	APPROACH
4. TEDREMGININ/DENES	DETERMINING NEEDS
5. REPNESGINT/REMHANCISED	PRESENTING MERCHANDISE
6. REVOMOGCIN/JOBTECSION	OVERCOMING OBJECTIONS
7. SLOGCIN/LEAS	CLOSING SALE
8. SLUP/GINLSLE	PLUS SELLING
9. NOCLSIN/CHEMANICS	CLOSING MECHANICS
10. PUFOLWOL	FOLLOWUP

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CAREER CBA'S

#38

PARTICIPANTS

3 Panelists or Teams bid on areas, answer questions.

1 Moderator opens bidding, reads questions.

1 Scorekeeper shows odds, indicates players' points.

3 Authorities make up final questions and answers.

3 Judges determine correctness of answers according to given questions.

Additional students take the losing panelists' places.

All students submit 5 sets of questions, 3 questions in each set.

GAMEBOARD

C	B	A
1	2	3

Directions

Each panelist or team starts the game with 50 points and decides how much of his total he wants to wager at the beginning of the game on the first question. Each player or team may wager up to 10 points on any one round of questions. A total of ten rounds comprises one game and each round has three questions—one each for CAREERS (C), BUSINESS (B), and ACTIVITY (A). The player with the most points after 10 rounds wins.

Play is begun when the moderator asks each player or team to decide how much he wishes to wager up to 10 points and in which of the three categories he wishes to wager. To make the game more interesting, some questions are more difficult than others. The scorekeeper may indicate these odds with numbers under each of the categories as shown above. The "1" under CAREERS (C) shows that it is the least difficult, the "2" under BUSINESS (B) the next level of difficulty, and the "3" under ACTIVITY (A) as the most difficult.

Each player should be given ten cards with points of 1–10, so that he can show his wager. The player should also be given three cards, one each for CAREERS, BUSINESS, and ACTIVITY to indicate in which category he is wagering. If two or more players bid on the same area, such as CAREERS, the player with the highest bid has the opportunity to answer the question, and the other player(s) do not participate in this category of questions. If two or more players choose the same area and wager the same amount of points, the moderator will open the bidding to those players and they may bid any number of points up to the amount which they possess. The player who bids the most will receive the question.

After wagering and bidding is completed, the moderator will ask the questions according to the order on the board, the CAREERS question first, the BUSINESS question next, etc., depending upon which ones have been selected. The moderator will read only those questions in the areas which have been bid upon. Each player will answer the question upon which he won the wager. If he answers correctly, his score is increased by the number of points he wagered multiplied by the odds (1, 2, or 3) in that area. If he answers incorrectly, his score is reduced only by the number of points he wagered.

For added interest, the tenth and last round of questions for the game may be played with no limits on the wagered amount except the number of points that a player has earned using the same rules for a tie bid.

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CLASSIFIED SELLING CAREERS

#39

Select ten of the selling jobs and check the classified section of the newspapers to determine the job opportunities in your area of the state for those ten careers. Clip ten "want ads" you find and glue them in the appropriate box. Complete the columns shown for kind of wholesale business and the duties which would be involved.

NEWSPAPER WANT ADS	KIND OF WHOLESALE BUSINESS	DUTIES INVOLVED

SELECTING A SALES TEAM

#40

DIRECTIONS: Place an "X" in the boxes under each wholesaler to show the sales personnel it employs. *NAME OF WHOLESALING CAREER*	MERCHANT WHOLESALER	PRODUCER'S SALES OUTLET	BROKERS AND AGENTS	PRODUCT ASSEMBLERS	CHAIN WAREHOUSE	PETROLEUM BULK STORAGE
Counter						
Stockman						
Ad Layout Man						
Display Man						
Public Relations						
Cashier, Cashier-Checker						
Salesclerk						
Auctioneer						
Counterman						
Routeman						
General Manager						
Route Supervisor						
Sales Manager						

DIRECT MAIL

#41

Any form of printed advertisement sent by the advertiser to the prospective customer through the mails is direct mail advertising.

Starr Wholesalers utilizes direct mail to build goodwill, promote new products, and solicit orders. Direct mail often paves the way for the salesman's personal call. Catalogues, brochures and special promotional flyers can be sent to selected audiences or geographical areas.

One of the most important elements of direct mail is the mailing list. A mailing list is a list of prospects that can use the advertiser's product. These lists are compiled from active customers, suggestions from salesmen and customers, telephone and city directories, trade directories and commercial list houses. Mailing lists must be reviewed and revised constantly. Some of the firms on Starr Wholesalers' list have gone out of business, some have merged with larger companies and some are undesirable customers.

Starr Wholesalers has an illustrated catalogue that lists merchandise available, the cost, and quantity breakdowns. During the year they supplement the catalogue with leaflets, a single folded sheet which may promote new products. A flyer is a single sheet which may inform of price changes or promote sales. Many firms use self-addressed post cards to encourage prompt action by the recipient.

Novelty items such as pens, pencils, note pads and order check-lists with Starr Wholesalers' name, address and phone number are mailed or given to customers to keep Starr's name constantly in front of the customer. This builds goodwill.

1. Direct mail paves the way for the ____________________ personal call.
2. To have a successful direct mail it is important to have a good mailing ____________________.
3. A large book with illustrations and price quotations is called a ____________________.
4. Pens, pencils, and note pads are called ____________________ items and are another supporting feature of sales.

DISPLAY

Displays help to increase sales in several ways. Starr Wholesalers often sets up displays of their products at trade and business meetings and conventions. In ancient times, merchants displayed their wares at the gates of the city. New wholesalers take these services to individuals and groups of customers.

Two main classifications are given to displays (or advertising): *promotional* and *institutional*. Displays that are designed to sell merchandise are called *promotional*. Displays that are created to build customer goodwill are known as *institutional* displays.

Salesmen from Starr Wholesalers often assist retailers with the construction or assembly of displays. Each of the following types of displays serve a merchandising purpose.

Assortment displays are those that give the customer an opportunity to select and buy different types of merchandise. *Impulse displays* are used to stimulate a customer's interest and desire that make him buy an item. They are designed to present merchandise so effectively that customers are persuaded to buy goods that they had not planned to purchase. *Point-of-purchase displays* stimulate many impulse purchases. These displays must be located in areas where they are easily seen and have passing traffic.

1. The purpose of display is to increase ____________________.
2. Merchants displayed their wares at the ____________________ of a city in ancient times.
3. Starr Wholesalers often display their products at ____________________ meetings and conventions.
4. Displays that are created to build customer goodwill are known as ____________________ displays.
5. Displays that are designed to sell merchandise are called ____________________ displays.
6. ____________________ displays give a customer the opportunity to select and buy different types of merchandise such as hammers, nails, plyers, electrical tape, and masking tape.
7. Point-of-purchase displays are ____________________ displays.

Customer Services	Advertising	Display	Sales Promotion	Publicity of Public Relations
Credit Purchases	Newspapers	Exterior (Window)	Direct Mail	Opening
Delivery/Shipping	Magazines	Interior: counters shelves walls buildups hangers shadow boxes	Premiums	Previews
Packaging/Wrapping	Radio	Impulse: (point-of-purchase)	Contests	Community Events
Labeling/Pricing	Television	Assortment	Samples	Community Participation
Information/Assistance	Outdoor (billboard, etc.)	Fashion	Exhibits	Special Events
Stock Inventory	Transit		Welcome Wagon	Check Cashing
Replacement Orders	Specialty		Specialty and Novelty Items	Guides
Adjustments/Returns	Directories and Programs			Consumer Advisory Boards
	Catalogs			Customer Relations
	Trade Journals			Employee Relations

Starr Wholesalers uses a combination of promotional activities to increase sales. These activities are called the *promotional mix*. A company must consider four factors in deciding what promotional mix will best suit their purposes: (1) the amount of money it has to spend on promotion, (2) the nature of the product, (3) the market for the product, and (4) the stage in the life of the product.

DATE	DAY	COLORS	EMBLEMS
January 1	New Year's	Apple green, white	Father time, baby, hourglass
February 12	Lincoln's birthday	Red, white, blue	Shields, flags, portraits
February 14	Valentine's day	Red, white	Hearts, cupids, arrows
February 22	Washington's birthday	Red, white, blue	Pageant, cherry tree, hatchets
Date varies	Easter	Violet and white, purple, yellow	Chickens, rabbits, flowers, religious symbols
May Date varies	Mother's day	Red and white	Flowers
June Date varies	Father's day	Brown, gold masculine colors	Pipe, tie
October 31	Halloween	Orange, black	Witches, cats, hats, owls
November Last Thursday	Thanksgiving	Red, burnet, orange, russet	Turkey, horn of plenty
December 25	Christmas	Red, green	Santa Claus, holly, bells, crosses, religious scenes

Mark with an X those phrases that identify non-personal promotional activities.

1. _______ Window washing
2. _______ Assembling displays
3. _______ Calling on customers
4. _______ Writing copy
5. _______ Receiving merchandise
6. _______ Making buying decisions
7. _______ Mailing promotional material
8. _______ Establishing customer credit
9. _______ Refilling vending machines
10. _______ Making out invoices
11. _______ Preparing mailing lists
12. _______ Shipping merchandise
13. _______ Preparing point-of-purchase displays
14. _______ Supervising all parts of catalogue compilation
15. _______ Advising salesmen of new materials and display aids available for their customers.

Select an ad from a trade journal. Ask your hardware store, drug store, or grocery store for a trade journal. Most companies will be happy to give them to you. If you are unable to secure a magazine, you will find an assortment of trade journals in the public library and an ad which can be copied for a nominal cost (Usually 10¢).

Bring to class a retail ad which advertises a hardware item directly to the ultimate consumer and a wholesale ad which advertises a hardware item to the retailer.

Compare the headlines.

Compare the illustrations.

What does the copy (sales message) of the ad in the trade magazine stress? The ad directed to the consumer?

CAREERS IN THE WHOLESALER-DISTRIBUTOR'S WAREHOUSE

#42

The warehouse of a wholesaler handles all merchandise entering and leaving the business, as well as the storing or stocking of it.

Receiving personnel check the incoming merchandise against the order and invoice to be certain the correct amounts, sizes, quality, etc., have been sent. They are also responsible for the unpacking, pressing, pricing, assembling, inventorying, and storing merchandise.

Shipping employees are charged with selecting, assembling, packing, and sending the correct merchandise ordered by customers. They must pack the products appropriately and choose the most suitable means of transportation available.

The warehouse usually encompasses the marketing functions of storage, transportation, standardization, and risk. In some cases it may be involved in buying through orders of staple stock and selling through phone or mail orders.

All activities in the warehouse may be classified into five major areas:

Receiving– unloading of delivered goods, inspection of number and condition of parcels, review of shipping methods and charges by supplier.

Checking– unpacking and inspection of incoming merchandise or review of outgoing orders for quantity, sizes, kind, quality, etc.

Marking – printing and attachment of merchandise tickets for goods and storage areas; assembling and preparing goods for delivery or storage areas.

Stockkeeping – effective storage of merchandise in bins or on shelves, supply of needed merchandise to the selling area, inventory and inspection of merchandise in storage and selling areas.

Shipping – returning damaged merchandise to supplier; picking, and packing merchandise for delivery or shipment to customers.

Some of the wholesale warehousing careers frequently found are:

a. *Receiving Supervisor* – coordinates all receiving, inventorying, and storing activities of incoming merchandise.
b. *Receiver* – checks all incoming merchandise against the purchase order and packing slip; sometimes called a receiving clerk.
c. *Materials Handler* – transports products between the dock, receiving, shipping, and storage areas by hand or with equipment.
d. *Checker* – inspects the incoming or outgoing merchandise for correct sizes, amounts, colors, quality, etc.
e. *Marker* – prepares merchandise tickets for incoming or outgoing goods and attaches the tickets to the products; sometimes makes shipping labels.
f. *Stockman* – stores and arranges incoming merchandise, prepares bin tickets, and keeps the stock orderly.
g. *Inventory Control Clerk* – checks merchandise in stockroom to determine amounts on hand, slow and fast-moving items, shortages, etc.
h. *Merchandise Distributor* – serves as a liaison between the buying and shipping/receiving departments of branch or chain retailers by allocating goods to the various stores.
i. *Merchandise Cataloguer* – responsible for identifying and classifying all merchandise received into an effective stock system for easy location.
j. *Merchandise Detailer* – identifies and classifies specific types of incoming merchandise according to amounts, styles, sizes, colors, etc.

k. *Stock Supervisor* -- coordinates and directs all stockkeeping activities and personnel.

l. *Order Dispatcher* — receives incoming orders by mail or telephone from customers desiring certain merchandise.

m. *Shipping Supervisor* — coordinates all selection, packing, and distributing activities for outgoing merchandise.

n. *Shipper* — checks the customer's order against the packing slip to be certain the correct merchandise is being sent.

o. *Order Picker* — selects the outgoing merchandise from the shelves, bins, etc., which is to be packed and shipped.

p. *Packer* — assembles merchandise to be shipped, selects an appropriate container, wraps and arranges the goods in the box, seals the box.

q. *Traffic Supervisor* — oversees all delivery activities; selects the best method of transportation to be used.

r. *Route Dispatcher* — assigns deliverymen the areas in which they will deliver merchandise to customers or commercial shipper.

s. *Deliveryman* — transports the retailer's merchandise from the business to the customer or a commercial carrier.

t. *Tracer* — communicates with customer, deliverymen, and commercial carriers regarding lost or damaged merchandise.

u. *Warehouse Manager* — supervises all wholesale warehouse activities.

v. *Warehouseman* — performs all job responsibilities of receiving, checking, marking, storing, and shipping in a warehouse.

In large businesses all of the job titles may be involved. Some may become more specialized, such as a telephone order dispatcher, loading checker, and shipping handler. In many smaller businesses, all or some of the job duties may be done by one person, called a warehouseman.

WAREHOUSING CAREERS AND ACTIVITIES

I. Which of the following activities are found in the wholesaler's warehouse? Place a mark in the space provided.

1. Marking the cost code, price, and other information, and attaching the ticket to each item ________
2. Storing stock in its proper place ________
3. Returning damaged stock to the manufacturer ________
4. Telling the customer what is on sale at the time ________
5. Figuring the payroll for the employees ________
6. Displaying merchandise ________
7. Checking merchandise received against shipping invoice ________
8. Completing the receiving report ________
9. Approving new charge accounts for customers ________
10. Arranging stock in a way to aid in the control and sale of merchandise ________

WAREHOUSING

List a brief description of each job and list area of warehouse operation in which each job is involved.

JOB	DESCRIPTION	AREA OF PERFORMANCE*
1. Materials Handler		
2. Checker		
3. Receiving Clerk		
4. Shipping Clerk		
5. Marker		
6. Stockman		
7. Packer		
8. Order Picker		
9. Route Dispatcher		
10. Warehouse Manager		
11. Receiving Supervisor		
12. Tracer		
13. Traffic Supervisor		
14. Order Dispatcher		
15. Inventory Control Clerk		

*Areas include receiving, checking, marking, storing, and shipping departments of the warehouse.

#42

#43

WAREHOUSE WINNERS

Wilson's Warehouse Supervisor has just been notified that the business is "in the red." Only seven of the eleven current warehouse personnel can remain. Four of the people must be "laid off." If you were the supervisor, which four would you let go? Indicate these with an "X" in the blank to the left of the career titles.

	CAREER TITLE	RESPONSIBILITY
________	1. Checker	inspects incoming merchandise
________	2. Receiving clerk	checks in merchandise against purchase invoice
________	3. Materials handler	transports goods between dock and storeroom
________	4. Stockman	stores merchandise in an appropriate order
________	5. Inventory control clerk	checks merchandise on hand to determine surpluses and shortages in the warehouse
________	6. Marker	prices and sometimes labels incoming merchandise
________	7. Traffic manager	decides method and routes of delivery or shipment
________	8. Packing supervisor	supervises picking and packing of shipped goods
________	9. Order picker	selects merchandise from shelves or bins to be packed
________	10. Packer	prepares merchandise for shipment in boxes, crates, etc.
________	11. Shipping clerk	checks order to see if it has been filled properly

List the four warehouse people you "laid off" in the blanks below and explain why you chose these four people.

1. ______________________ ____

____

2. ______________________ ____

____

3. ______________________ ____

____

4. ______________________ ____

____

WAREHOUSE WINDER

#44

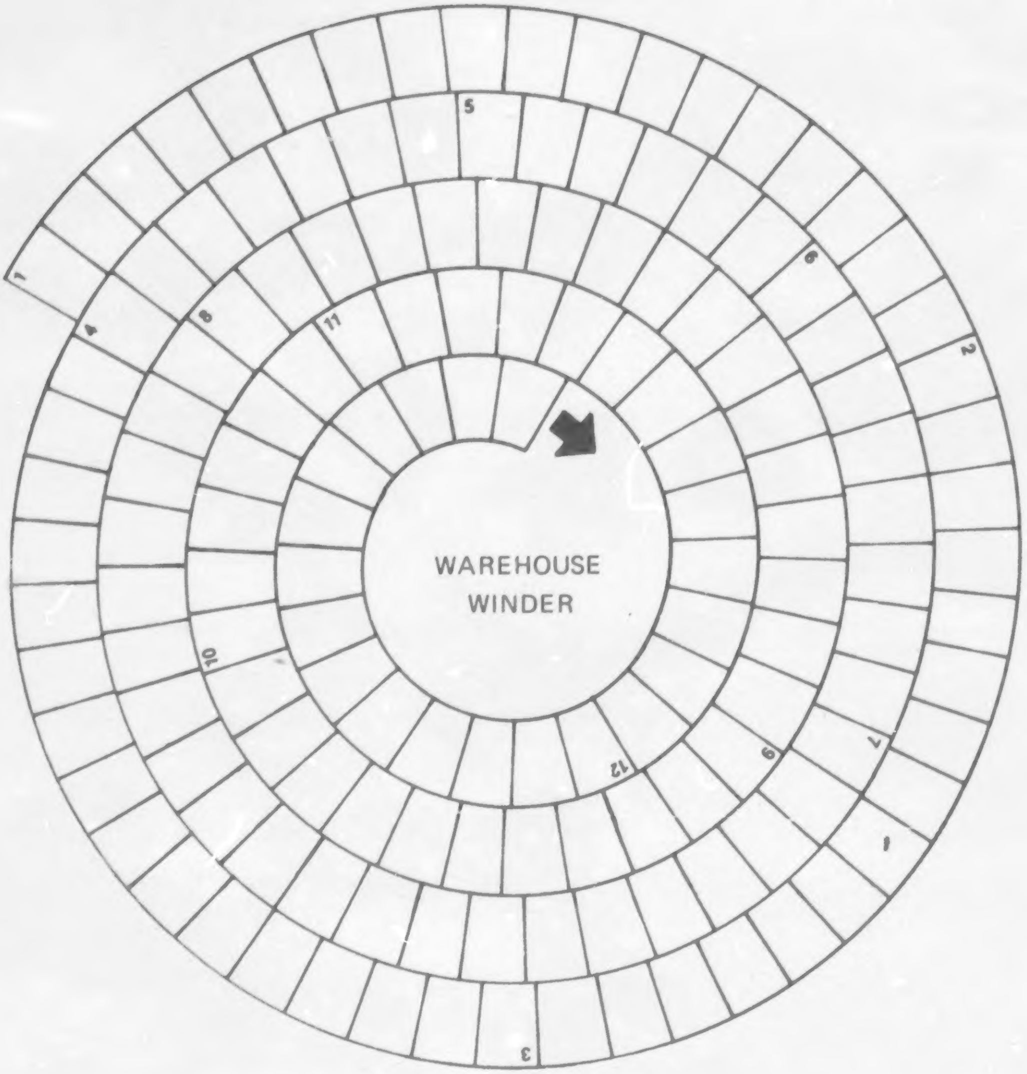
Solve the warehouse winder puzzle by writing the warehouse career title in the spaces which are provided to match its description below. Each of the careers is listed according to the order in which they could be involved in the receipt, stocking, and shipment of goods. In the case of some jobs which could be involved more than once, it is placed where it would first be involved.

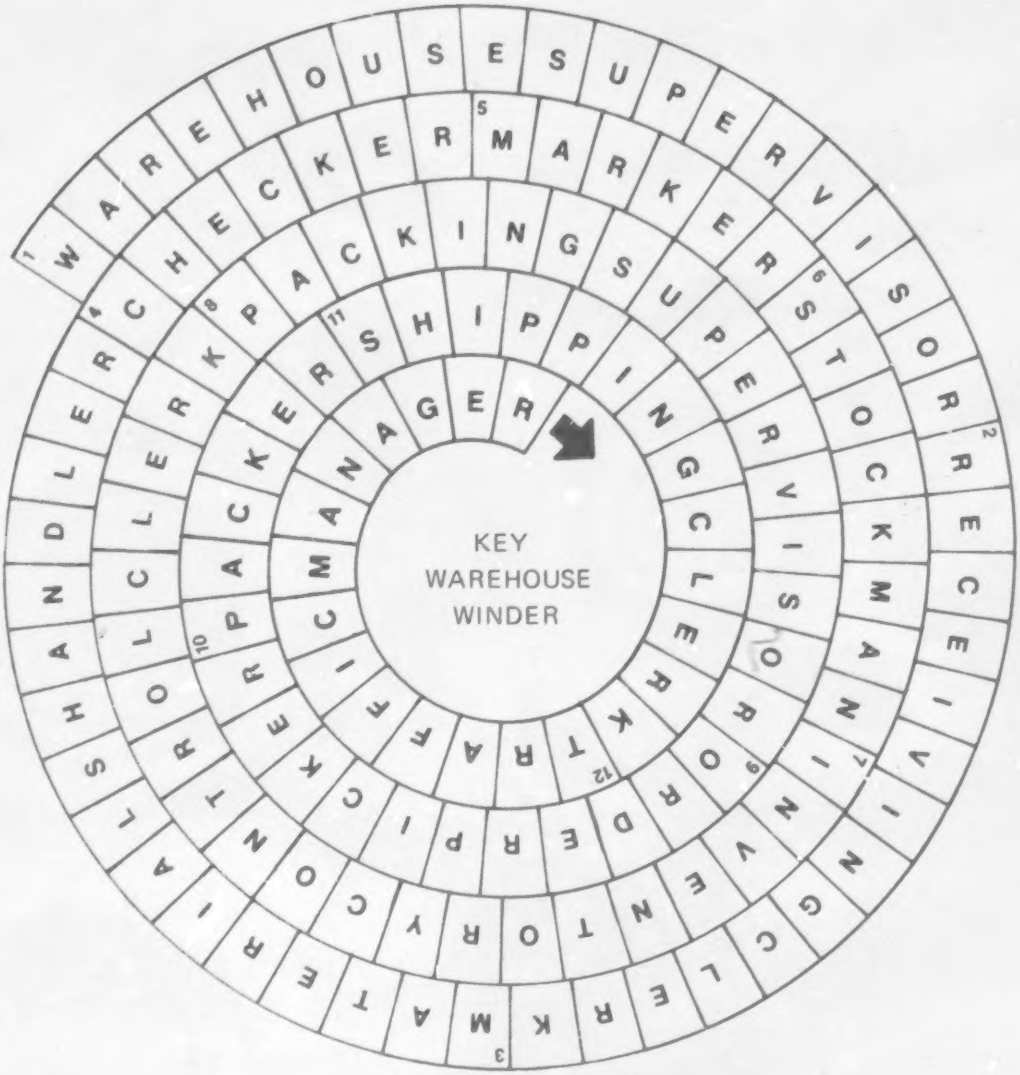
DESCRIPTIONS:

1. coordinates activities within the warehouse
2. checks in merchandise against purchase invoices and orders
3. transports goods between dock, receiving, storage, packing, and shipping
4. inspects incoming merchandise for amounts, quality, etc.
5. prices and sometimes labels incoming merchandise
6. stores merchandise in an appropriate order
7. checks merchandise on hand to determine surpluses and shortages in the warehouse
8. supervises picking and packing of shipped goods
9. selects merchandise from shelves or bins to be packed
10. prepares merchandise for shipment in boxes, crates, etc.
11. checks order to see if it has been filled properly
12. decides method and routes of delivery or shipment

AUTO PARTS
AUTO PARTS

#44


WAREHOUSE
WINDER
1
5
6
2
4
8
11
10
12
9
7
1
3


KEY
WAREHOUSE
WINDER
1 WAREHOUSE SUPERVISOR
2 RECEIVING CLERK
3 MATERIAL HANDLER
4 CHECKER
5 MARKER
6 STOCK MAN
7 INVENTORY CONTROL CLERK
8 PACKING SUPERVISOR
9 ORDER PICKER
10 PACKER
11 SHIPPING CLERK
12 TRAFFIC MANAGER

WORKING IN A WAREHOUSE

#45

THE JOB	JOB PERFORMANCE	QUALIFICATIONS NEEDED
Stock Clerk	Counts, sorts, or weighs goods received; checks them against invoices. Stores items according to style, size, or type. Fills incoming orders and requisitions on needed items. Prepares stock records and inventories.	Good physical condition. Arithmetic skill and accuracy in figuring and checking. Clear handwriting and neatness in maintaining records.
Receiving Clerk	Receives, unpacks, and examines goods. Checks shipment against bill of lading or invoice. Keeps records of goods received, short, over, and damaged.	Good physical condition. Care in handling goods and accuracy in checking invoice and other forms. Clear handwriting to keep records and prepare forms.
Shipping Clerk	Prepares goods for shipment. Checks quantities and indentification numbers against the order. Writes address and other instructions on outside of cartons and cases and moves them to shipping platform.	Good physical condition. Accuracy in checking orders and figuring shipping charges. Clear handwriting for marking shipments.
Shipping and Receiving Clerk	Receives incoming shipments, prepares goods for shipping, and keeps necessary records. Determines method of shipment. Places identifying information and instructions on shipments. Checks shipments received. Records shortages and rejects damaged goods.	Clear handwriting for keeping records and preparing forms. Good arithmetic skills for figuring shipping charges. Accuracy in making out forms, preparing shipments, and checking charges. Good judgment needed to select correct carrier for shipments.
Billing Clerk	Types invoices, bills of lading, and shipping labels. Figures amounts due on purchase orders, sales tickets, and charge slips.	Accuracy in preparing various forms. Knows how to type and operate adding or calculating machine.
Freight Rate Clerk	Classifies items to be shipped according to the rate-book descriptions, figures charges, and records them on the bill of lading. Determines storage charges, then records them. Answers inquiries regarding rates, routing, and packing.	Knows how to read freight-rate publications. Good arithmetic skill and accuracy in figuring and recording. Good judgment in applying freight rates.
Interline Clerk	Figures freight charges on shipments traveling over more than one transportation time. Figures amounts due to each carrier and records calculations on special forms. Checks statements from other companies.	Good arithmetic skill and accuracy in reading and figuring. Knows how to type and use calculating machine.
Tracer Clerk	Locates delayed or lost shipments. Contacts shipper for necessary information.	Speaks easily and intelligently with shippers and customers. Writes clear, tactful letters. Exercises good judgment in following through shipping errors and investigations.

#45

THE JOB	JOB PERFORMANCE	QUALIFICATIONS NEEDED
Traffic Agent	Contacts firms to solicit their business. Explains advantages of using his company's facilities. Quotes tariffs, rates, and schedules. Acts as contact between shipper and carrier to obtain information for settling complaints.	Must know his company thoroughly to be able to impress customers with what he has to offer. Should be able to speak convincingly, and have a pleasing, likable personality.
Traffic Manager	Decides what form of transportation is best for the particular order and follows through on arrangements with the transportation company. Marks loading and arrival time on shipping order. May also type bills and correspondence and keep files.	Interprets shipping orders accurately. Gives clear, precise instructions to the transportation company. Knows how to type.
Over-short-and-damage Clerk	Examines shipping reports and other forms for information relating to shipping errors. Inspects damaged freight to determine value. Prepares written reports and letters.	Good reading skill, good command of English. Good judgment in settling errors. Knows how to type.
Material Handler	Loads, unloads, stores, and moves goods. Attaches goods or labels, or marks information on cases and cartons. Operates hand truck, dolly or materials handling equipment.	Students complete and discuss.
Hand Packer	Prepares goods for shipment. Records the weight of goods shipped and also the time and date when cartons are filled.	Students complete and discuss.
Weigher	Records weight on ticket, product, or material. May operate hand truck.	Good physical condition. Accuracy in reading and figuring. Clear handwriting.

WORKING IN A WAREHOUSE

#45

1. As you label a final box to be transported, another shipping clerk whispers, "Why don't you slow down? You want to make the rest of us look bad?" What would you say and do?

___

___

___

2. As an order picker, you are selecting pieces of china to fill an order and break a cup by dropping it. Everyone else is at lunch. What would you do?

___

___

___

3. As the inventory clerk, you are checking shelves of auto parts, when you notice another employee slipping a carton of spark plugs into his car. What would you do?

___

___

___

4. As a receiving clerk, you are responsible for checking the incoming store merchandise against the order. While you are halfway through unpacking, your best friend comes in and says, "Let's go to lunch. I've only got thirty minutes." What would you do?

___

___

___

5. As the warehouse manager, you hire and fire employees. One of your stock clerks has been negligent about issuing receiving records although you have talked to him several times. You are expecting a two-months' rush and have a new inventory clerk you'd like to have as the stock clerk. Your present stock clerk supports an invalid mother, a wife, and three small children! What would you do?

___

___

___

RECEIVING REPORT

This form is to be filled out and sent to the purchasing agent the day that material is received.

If this report indicates a partial shipment, a supplemental receiving report should be prepared showing materials yet to be received on this order.

Provide full particulars if material is unacceptable for any reason.

Rec. By	Shipper	Shipped from (city only)	Carrier	Carrier's No.	Items Rec.	Wt.	Chgs.	Dept.	Rec. No.	Date Rec.

Report loss or damage immediately to the purchasing division.

Retain container and contents for inspection.

Furnish damage report on form supplied by purchasing department.

PARTIAL SHIPMENT_____ ORDER COMPLETED_____

#46

PURCHASE ORDER

#46

PURCHASE ORDER

TO:

Purchase Order No.:
Date:
Deliver to: Starr Wholesale Co.
5183 Industrial Blvd.
Orlando, Fl 32089

Delivery Date:

Ship By:

Quantity	Description	Unit Price	Extension Amount

Terms 2% 10 days; net 30

Purchasing Agent

INVOICE

#46

Invoice (Supplier's Name)

Sold to:

Starr Wholesale, Inc.
5183 Commerce Avenue
Orlando, Florida 32089

Invoice No.:
Date:
Terms:

Customer Order Number	Date Received	Date Shipped	Ship Via (General Shipping Instructions)

Quantity Ordered	Stock Number	Description	Quantities		Unit Price	Extension Amount
			Shipped	back order		

PACKING SLIP

#46

Packing Slip

From:

To: Starr Wholesalers, Inc.
5183 Commerce Road
Orlando, Florida 32089

Quantity Ordered	Description	Quantity Shipped	Quantity Back-Ordered

LOSS OR DAMAGE CLAIM

#46

Name of store filing claim ______________________

Address: ______________________

____

Name of vendor against whom claim is filed ______________________

Address: ______________________ Invoice Number:

______________________ ______________________

Shipped from ______________________ To ______________________

Date Shipped ______________________ Date Received ______________________

Name of Carrier ______________________

____

DETAILED STATEMENT OF CLAIM
(number and name of items damaged, nature of damage, unit cost, shipping cost, total amount of claim)

TOTAL AMOUNT OF CLAIM	

The foregoing statement is certified to be correct. ______________________
(signature of claimant)

STOCK RECORD CARD

#46

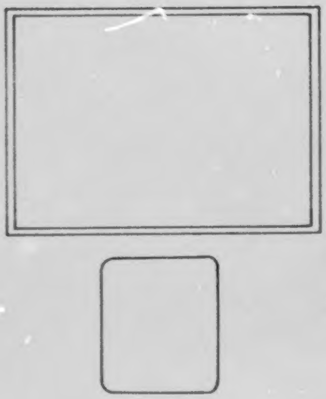
ITEM ______________________ SUPPLIER ______________________

LOCATION ______________________ STYLE NO. ______________________

MAXIMUM ____________ MINIMUM ____________ REORDER POINT ____________

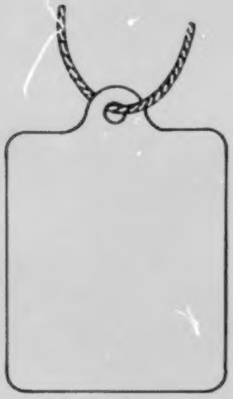
Date	Received	Issued	On Hand	Ordered		
				Date	Order No.	Amount

PRICE TICKETS



GUMMED

PIN



STRING

#46

INVENTORY REPORT

Department	Item	Quantity on Hand	Cost		Retail	
			Per Item	Total	Per Item	Total
			TOTAL INV. AT COST		TOTAL INV. AT RETAIL	

STOCK REQUISITION

#46

Stock Requisition
Starr Wholesalers, Inc.
5183 Commerce Road
Orlando, Fl. 32089

Authorized Signature: ______________________________

TO:

Date: ______________________________ Department: ______________________________

Consigned to: ______________________________ Invoice No.: ______________________________

Quantity	Stock No.	Bin No.	Description	Warehouse Use	
				Quantity Picked	Quantity Back-Ordered

Material Handler: ______________________________

ROUTING REPORT

#46

Type of goods being shipped ______________________________

Size, weight, and value of shipment ______________________________

Delivery date requested ______________________________

Distance from shipper to consignee ______________________________

Carrier Type & Method	Equipment & Service	Reliability	Cost	Speed

Carrier chosen for shipment ______________________________

Reasons for choosing this carrier ______________________________

____

____

____

WAREHOUSE WOES

#47

Your group is to use the method of majority rule in reaching a decision. The task assigned *must* be agreed upon by more than half of the members before it becomes a part of the group decision. A majority vote is sometimes difficult to reach. Therefore, not everyone's opinion will meet with the group's approval. Try, as a group, to make each ranking one with which *all* group members can at least partially agree. Here are some guides to use in reaching decisions:

1. Avoid *arguing* for your own individual's judgements. Approach the task on the basis of logic.
2. Avoid changing your mind *only* in order to reach agreement and avoid conflict. Support only solutions with which you are able to agree at least partially.
3. Avoid "conflict-reducing" technique such as averaging or trading in reaching decision.
4. View differences of opinion as helpful rather than as a hindrance in decision-making.

Ward's Wholesale Company's financial statement shows that high labor costs have caused the company to operate in "the red." Assume that the company manager has notified you, the warehouse supervisor, that you must cut your staff to seven. These seven people must be able to assume the responsibilities of those let go. Your task is to decide which four must leave:

Your group must reach a majority decision on which four people must be laid off in order to reduce labor costs.

You have twenty minutes to reach a decision on this problem.

1. Traffic Manager, a 55 year-old retired Army colonel
2. Receiving Clerk, a "swinging" 30 year-old bachelor
3. Inventory Control Clerk, a 35 year-old divorcee with two children
4. Materials Handler, a 22 year-old ex-convict of bank robbery
5. Checker, the 20 year-old daughter of the company manager
6. Marker, the 60 year-old widow of a teacher
7. Stockman, a 50 year-old "laid off" railroad engineer
8. Packing Supervisor, a 40 year-old disabled war veteran
9. Packer, a pregnant 25 year-old woman
10. Order Picker, an 18 year-old high school student
11. Shipping Clerk, the 30 year-old husband of the pregnant packer

WAREHOUSE WOES ISSUES

#47

The following are guidelines to discuss the way in which your group arrived at a majority decision about those warehouse people who would be "laid off."

(1) What feelings were expressed in reaction to this situation? (e.g. frustration, withdrawal, anger)

____

____

____

(2) Did you observe any different styles of leadership? Who dominated or exerted the most influence? How and why? Were there feelings of competition for leadership? How much need was there for organization?

____

____

____

(3) How did the members of your group reconcile conflicts of value? (compromise, domination of one person, etc.)

____

____

____

(4) Was your behavior in this situation characteristic of the way you work in a group? Why or why not?

____

____

____

(5) Did everyone participate? Do you feel that the decision reached really represents the opinions of the majority?

____

____

____

WAREHOUSING FORMS AND CAREERS

#48

Some of the important forms and records involved in the warehouse:

Purchase Order – retailer's copy of merchandise that was ordered from a supplier, usually by a company buyer.

Vendor's Invoice – supplier's bill for merchandise shipped to the retailer according to the purchase order received.

Packing Slip – itemized paper in container showing contents shipped, including styles, colors, sizes, and quantities.

Inventory Control Sheet – form identifying price and characteristics of merchandise that is in stock.

Stock Record Card – current detailed information about the amounts of merchandise received, sold, and on hand by individual item.

Merchandise Ticket – small slip of paper providing information such as the price, style number, manufacturer, size, and date received.

Bin Ticket – marker affixed on storage shelves or bins which identify the merchandise stored in that area.

Receiving Record – report of date, quantities, descriptive details, and condition of incoming merchandise.

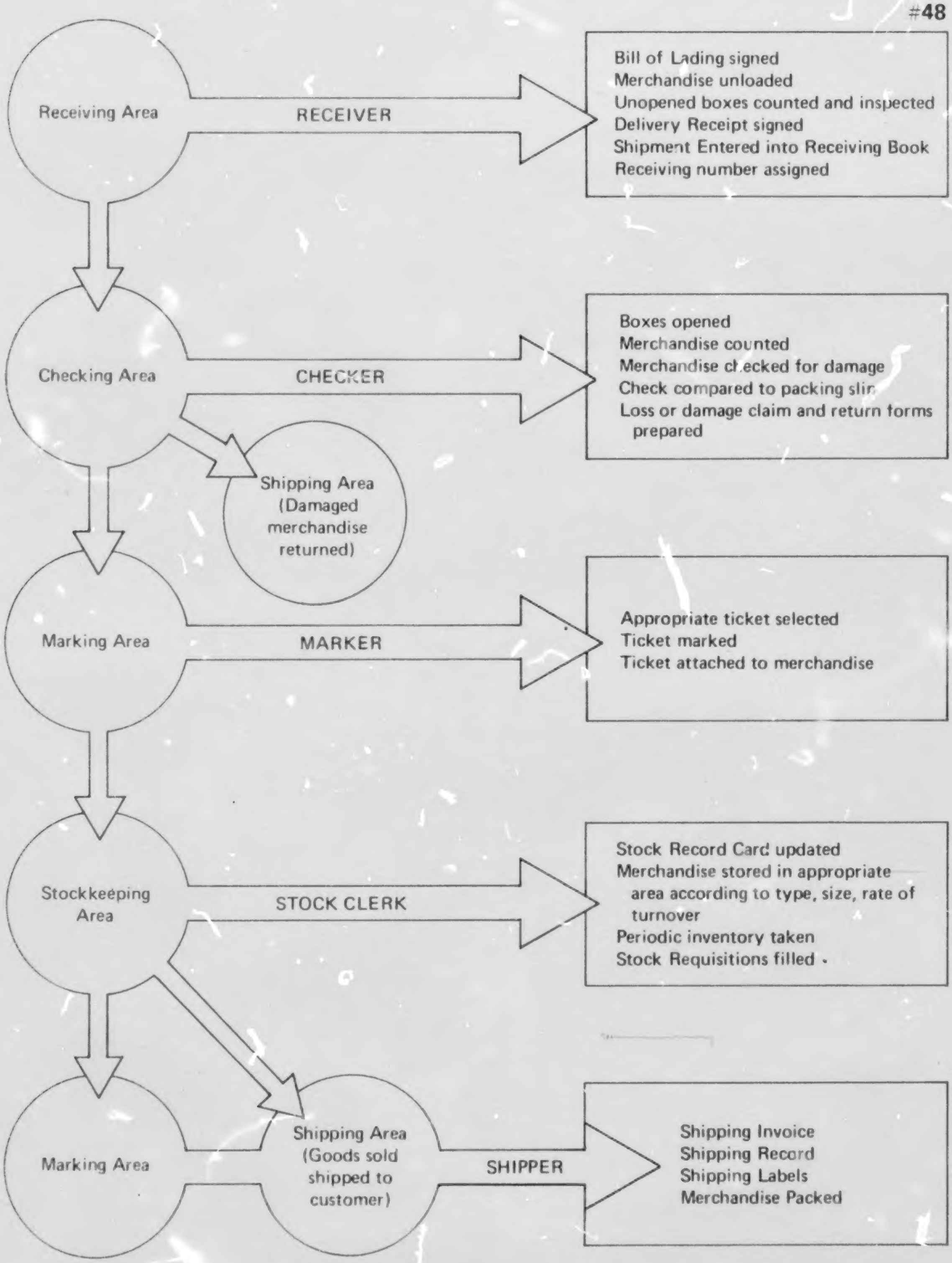
Stock Requisition – form used to authorize the removal of goods from the stockroom to the sales floor or shipping area.

Bill of Lading – contract agreement between the seller (shipper) and the carrier for the carrier to deliver goods to the buyer.

Shipping Record – report of date, quantities, detailed characteristics, method of shipment, and carrier for outgoing goods.

Shipping Lable – identifying paper on the outside of a container packed with outgoing merchandise showing the buyer to whom it is being sent and the seller who is sending it.

#48


Receiving Area
RECEIVER
Checking Area
CHECKER
Shipping Area (Damaged merchandise returned)
Marking Area
MARKER
Stockkeeping Area
STOCK CLERK
Marking Area
Shipping Area (Goods sold shipped to customer)
SHIPPER

Bill of Lading signed
Merchandise unloaded
Unopened boxes counted and inspected
Delivery Receipt signed
Shipment Entered into Receiving Book
Receiving number assigned

Boxes opened
Merchandise counted
Merchandise checked for damage
Check compared to packing slip
Loss or damage claim and return forms prepared

Appropriate ticket selected
Ticket marked
Ticket attached to merchandise

Stock Record Card updated
Merchandise stored in appropriate area according to type, size, rate of turnover
Periodic inventory taken
Stock Requisitions filled

Shipping Invoice
Shipping Record
Shipping Labels
Merchandise Packed

#48

Name of Merchandise Handling Document	Approved By (Position)	Sent To (Position)	Copies Made (Number)	Copies Sent To (Position)	Reason for Form
Purchase Order					
Stock Requisition					
Invoice					
Packing Slip					
Receiving Report					
Other (Specify)					

WHO, WHAT, AND WHERE IN THE WAREHOUSE

RECEIVING	CHECKING	MARKING	STOCKING	SHIPPING
____ ____	____ ____	____ ____	____ ____	____ ____
____ ____	____ ____	____ ____	____ ____	____ ____
____ ____	____ ____	____ ____	____ ____	____ ____
____ ____	____ ____	____ ____	____ ____	____ ____

DIRECTIONS: Study each of the Shipping/Receiving Department forms and careers below and decide in which of the five major areas above each may be found. Place its letter in the appropriate box above. Some letters may be used more than once.

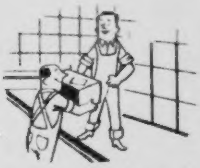
SHIPPING/RECEIVING FORMS

A. Purchase Order
B. Vendor's Invoice
C. Packing Slip
D. Inventory Sheet
E. Receiving Record
F. Stock Record Card
G. Bin Ticket
H. Bill of Lading
I. String Ticket
J. Stock Requisition
K. Shipping Record
L. Gummed Label
M. Pin Ticket
N. Shipping Label
O. Shipping Invoice

SHIPPING/RECEIVING CAREERS

P. Marker
Q. Checker
R. Shipper
S. Loader
T. Receiver
U. Stock Clerk
V. Packer
W. Tracer
X. Cataloguer
Y. Order Picker

#49



#50

WAREHOUSING ACTIVITIES

Receiving Clerk-Unloading A Shipment

When Starr Hardware Wholesalers receives a shipment of Christmas trees, the merchandise is unloaded at the unloading dock by material handlers or warehousemen. The receiving clerk has an important job in making certain that the shipment is correct, undamaged and that correct freight charges have been made. The receiving clerk must also use various forms to keep record of the incoming goods.

In receiving merchandise, the receiving clerk first checks the number of boxes shown on the bill of lading or the delivery receipt furnished by the transportation company. By doing this, he makes certain that the correct amount of merchandise has been delivered. The receiving clerk may refer to a copy of the "Uniform Freight Classification" and spot check the shipment to see that the freight charge is correct. The weigher spot checks the boxes to see that the proper charge for weight has been made.

Complete the following questions:

1. Another name for a warehouseman is a ________________________________.

2. The warehouseman, when receiving merchandise, is responsible for ____________________ the merchandise and placing it on the ____________________ of the warehouse.

3. The first task of the receiving clerk is to ____________________ the number of boxes being delivered.

4. The receiving clerk makes certain that the physical count of boxes being delivered is the same on the ____________________ or the ____________________ receipt furnished by the transportation company.

5. The receiving clerk often checks freight notes on shipments by using the publication ____________________.

6. The weight of individual boxes is checked during the receiving process by the ____________________.

Receiving Clerk – Approving Receipt of Shipment

If the shipment of Christmas trees seems to be in good condition and the correct amount has been delivered, the receiving clerk signs the delivery receipt or Bill of Lading for the shipment.

The next step in receiving shipments at the Starr Warehouse involves use of internal warehousing forms which keep track of the merchandise on hand. Accurate records serve two purposes. They show that the supplies can be paid for because the shipment has been received and accepted. They are used by the company in case it is necessary to make claims for damages or incomplete shipments. Two types of receiving records are used: (1) The receiving report and (2) the apron system.

In completing the receiving report, the receiving clerk enters the number of *packages* of Christmas trees, the date of delivery, the vendor's or supplier's name, the weight of the goods, shipping charges and the name of the delivery firm. The invoice (Bill for merchandise) number and price of the merchandise may also be recorded.

Complete the following questions:

1. The ____________________ or company who delivers the merchandise, furnishes the delivery receipt or bill of lading to the receiving clerk.

2. Accurate ____________________ serve two purposes; (1) show that payment can be made and (2) may be used to report damage/loss claims.

3. Two types of receiving records are (1) ______________________ and (2) ______________________.

4. List four items the receiving clerk records on the receiving report ______________________________________

____

5. Another name for a bill for merchandise is an ____

Receiving Records – Apron System

Some wholesalers use the Apron System rather than receiving reports to record receipt of merchandise. The apron form gives the important details of a shipment from the time it leaves the shipper until the invoice is paid by the consignee (receiver of goods). A rubber stamp may be used as a substitute for the apron form but both contain information about the shipment. The information from the rubber stamp is applied to the back of the invoice.

The information included on the apron is obtained by checking the invoice against the original purchase order to check the following: (1) quantity, type, model, etc. is correct, (2) price is correct, (3) that proper cash discounts have been given, (4) that shipping instructions were followed. Information entered on the apron include a receiving number assigned to each incoming shipment. This receiving number is put on each package by the receiving clerk or his staff. Other items on the apron are the department number, the purchase order number, items on the purchase order and invoice, date shipment was checked.

The receiving report and the apron system guard against payment of duplicate invoices because both are not completed until goods are received. The apron system serves to identify each article in a shipment even after the article is put in stock or storage. The apron system may also be used as a guide in marking and storing goods and as a permanent record after the goods have been processed because it usually has copies of the purchase order or bill of lading attached to it.

Complete the following questions:

1. Two types of receiving records used in processing incoming goods at the Starr Warehouse would either be the ______________________ or the ______________________ system.

2. A ______________________________ is sometimes used as a substitute for the apron system.

3. The information placed on the apron is obtained from the original ______________________ compared against the ______________________________________.

4. List four items the receiving clerk compares between the purchase order and the invoice.

   1. ____
   2. ____
   3. ____
   4. ____

5. List four reasons for having receiving records.

   1. ____
   2. ____
   3. ____
   4. ____

Unpacking, Checking and Returning Goods

The Stock Clerk under the supervision of the receiving clerk is responsible for opening cartons and checking the contents for correct quantity, color, size, type. He also checks for concealed damage within each package. Packages are not usually opened until the invoice or packing slip is received. These forms are necessary in order to have a reference of comparison to discover any shipping errors.

One of the packages within a shipment will contain the packing slip. It will be labeled "Packing Slip Enclosed". The stock or receiving clerk opens and compares the contents of each box with the packing slip. If any shortages, overages, or substitutions are discounted, the stock clerk reports them on the receiving report. When goods are checked in, the completed receiving report is sent to the purchasing agent who compares it with the suppliers (vendor's) invoice. If both forms match, the purchasing agent makes payment to the vendor.

If merchandise is incorrect or damaged it is returned to the vendor. The receiving clerk is responsible for re-packing the goods and notifying the vendor of the reason why they are being returned.

Complete the following questions:

1. The ______________________________ is under the supervision of the ______________________________ .
2. The stock clerk is responsible for opening and checking cartons to determine if the shipment contains the right ______________________________ and ______________________________.
3. Cartons of merchandise are not opened until an invoice or ____________________ is obtained.
4. If Starr Wholesaling Warehouse ordered 500 Christmas trees but only received 475, this would be known as a ____________________ and would be reported on the ____________________form.
5. When goods are checked in, the completed receiving report is forwarded to the ____________________ agent who compares the report with the vendor's ____________________ .
6. The ____________________clerk is responsible for returning damaged goods to the vendor.

Marking

When Christmas trees have been received by the receiving clerk and the shipment accepted for payment, the receiving clerk informs employees called workers, who may pre-price the trees as a service to the retailer.

The markers are informed by the purchasing agent as to what retail price to use. Three methods of informing markers of the price to use:

1. The worker is given the invoice with the retail price marked opposite each item.
2. The price may be marked on only a few samples.
3. "Pre-retailing" is frequently used for staple items.

Pre-retailing is a method in which the price is decided upon when the item is ordered. The price is usually written on the duplicate copy of the purchase order which is given to the markers.

Merchandise must be clearly marked if the wholesaler is to aid the retailer. The method of marking is determined by the kind of merchandise being marked. Tickets, toys, gummed labels, ink stamps, grease pencils, or bin and shelf tags may be used.

Complete the following questions:

1. The____________________ is responsible for finding out the price of merchandise and placing this price on goods.

2. __________________ ____________________ is done by the wholesaler to save the retailer time.

3. List 3 methods used to inform markers of prices to be used

   1. ____

   2. ____

   3. ____

4. List five types of pricing methods.

   1. ____

   2. ____

   3. ____

   4. ____

   5. ____

Storage

After goods are received and marked, they must be moved promptly from the receiving room to make room for more shipments. Merchandise is removed and stored in its proper place in the warehouse by materials handlers. These employees use fork lift trucks, cranes, conveyors, etc. as a means of moving goods within the warehouse. These employees must be safety minded and have a knowledge of packing techniques used in storing goods. In addition to storing merchandise, materials handlers work closely with order pickers in the shipping department.

Complete the following questions:

1. Goods are moved from the receiving department by ____________________ ____________________.

2. Materials handlers must know methods of storing merchandise and be ____________________________ minded around the equipment they operate.

3. Materials handlers use ________________ ____________________ ____________________,

   hand trucks, __________________ and other machinery in moving goods in the warehouse.

4. Materials handlers also work with ____________________ ____________________ in getting

   customer orders prepared for the ____________________ department.

Tracing Shipments

If a shipment has been delayed or not received, the receiving clerk prepares a request asking that the shipment be traced. This is sent to the transit company who attempts to locate the goods. A *shipper* may request a trace when the shipment appears lost or when it has not reached its destination. The shipper may also request a trace in order to notify the receiver (consignee) of the location of the goods and when they will arrive.

Complete the following questions:

1. When a shipment does not arrive the ____________________ ____________________ prepares a ____________________ and sends it to the transit company.

2. A shipper may also request a ____________________ to notify the purchaser of the goods of their location and delivery date.

3. Another name for purchaser and receiver of goods is ____________________ ____________________.

Presenting Claims

Unconcealed damage, such as broken or leaking boxes is exigent during unloading of merchandise. The package and shipment is left alone until a local freight agent has been notified and inspected the damage. He prepares a report and gives it to the over-short-and-damage clerk (O,S&D Clerk). The O,S&D clerk prepares a claim for loss or damaged merchandise and includes a copy of the freight bill and invoice which he forwards to the transit company.

When actual damage is of a concealed nature, it will not be discovered until the merchandise is unpacked or resold. The above process is followed by the O,S&D clerk who forwards the claim to the transit company. Warehouses are usually allowed up to 9 months to file a claim for concealed damage.

Overcharge claims may be made to the transit company and vendors if an error (overcharge) is found in notes paid for weight, bill of lading description or freight charges. Even though an error has been made, the invoice is paid in full with an overcharge claim attached.

Complete the following questions:

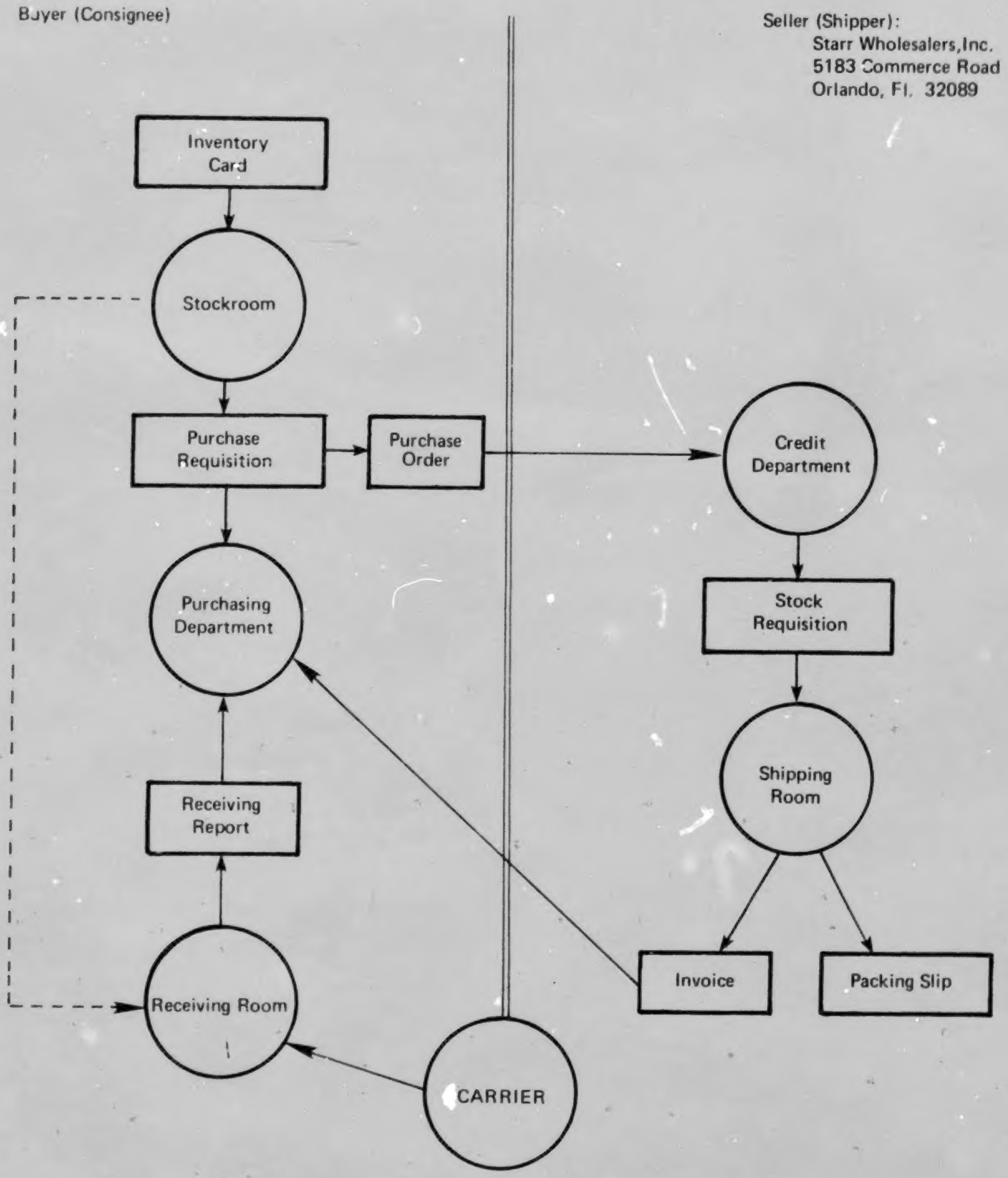
1. Two kinds of damages are ____________________ damage and ____________________ damage.

2. A ____________________ agent is notified if a shipment appears damaged.

3. The freight agent's report is given to the ____________________ ____________________ and ____________________ clerk.

4. The O, S&D clerk submits claims for overcharge and damages to the ____________________ company or the ____________________ of the merchandise.

SHIPPING PROCEDURE


Buyer (Consignee)
Seller (Shipper):
Starr Wholesalers,Inc.
5183 Commerce Road
Orlando, Fl. 32089
Inventory Card
Stockroom
Purchase Requisition
Purchase Order
Purchasing Department
Receiving Report
Receiving Room
CARRIER
Credit Department
Stock Requisition
Shipping Room
Invoice
Packing Slip

SHIPPING PROCEDURES

Divide the class into several groups. Each group will investigate the shipping procedure for a major shipping company, a post office, school, or a carrier in your city (check with the teacher before contacting any company). If possible, select one shipment and trace it through the eight steps giving as much detail as possible. Each report should give as much detail as possible, such as; sketches of work areas, descriptions of equipment, guides, rates, boxes, shipping documents, etc. Each group should be prepared to discuss the particular aspect of shipping procedures it investigated.

GATHERING THE ORDER

Type of document used by order picker

Is order checked for accuracy?

If so, by whom? (give position)

Type of equipment used to gather the order

PACKING ORDER

Who selects the shipping package? (give position)

Type of package used

Describe the type of cushioning or packing used

Describe how the carton, box, or container is sealed

MARKING THE ORDER

Where is the shipping label prepared? (attach a sample, if possible)

What other marks are placed on the carton, box, or conatiner?

Briefly state the purpose of each mark

WEIGHING THE ORDER

Is the order weighed? ____________________

Who weighs the order? (give position) ____________________

Describe the type of equipment used ____________________

____

Indicate how and where the weight is indicated ____________________

____

SELECTING THE CARRIER

Does the shipper or the consignee determine the carrier selected? ____________________

If the shipper selects the carrier, give position of the person marking the selection ____________________

____

Type, method, and name of carrier(s) selected ____________________

____

Is the carrier selection routine or does it require considerable judgment? ____________________

____

DETERMINING SHIPPING COSTS

Name the rate or tariff books consulted ____________________

____

Describe how the total shipping cost is calculated ____________________

____

LOADING THE SHIPMENT

Who is responsible for loading the shipment? (give position) ____________________

____

Describe the loading procedure, including the equipment used ____________________

____

RECORD KEEPING

Identify the shipping records which are kept by the shipper after the shipment has left the loading dock ____________________

____

____

Directions:

# 50

Place on "X" in the boxes under each column to show which forms each of the shipping-receiving career personnel may handle.

SHIPPING-RECEIVING CAREERS	Purchase Order	Vendor's Invoice	Packing Slip	Inventory Sheet	Stock Record Card	Merchandise Ticket	Bin Ticket	Receiving Record	Stock Requisition	Bill of Lading	Shipping Record	Shipping Label
Receiving Supervisor												
Receiver												
Materials Handler												
Checker												
Marker												
Stockman												
Inventory Control Clerk												
Merchandise Distributor												
Order Dispatcher												
Shipping Supervisor												
Shipper												
Order Picker												
Packer												
Traffic Supervisor												
Route Dispatcher												
Deliveryman												
Tracer												
Stockroom Manager												

THE WAREHOUSE LAYOUT

#51

INSTRUCTIONS – Read the following information pertaining to warehouse layout and answer the questions which follow your reading.

Planning the interior layout of a warehouse is most important in utilizing all available floor space allotted for storage. To plan a layout, the type of merchandise to be stored is the most important consideration. Large items such as washing machines cannot be stored in the same manner as smaller items such as light bulbs.

Basically, there are two methods of using space in warehouses: vertical and horizontal space. Vertical space refers to the height of storage and is limited to both type of product to be stored and ceiling height. Horizontal space refers to the amount of floor space required for storage and is limited to the size of the floor and width of aisle space necessary to move products through the warehouse.

In planning for space, consideration to the type of goods is of primary importance. Goods may be grouped under various headings that influence layout decisions. Types of goods stored are as follows:

1. Perishable items must be protected from dampness and temperature changes.
2. High value items are subject to pilferage and must be protected.
3. Dangerous commodities such as explosives must be separated from each other and safety measures taken in storage.
4. Large bulky containers and very heavy items should be kept near the shipping area.
5. Light fragile items must be stored where they won't be crushed or broken with proper handling procedures taken into consideration.
6. Fast moving items should be stored in easily accessible areas.
7. Slow moving items should be stored in less accessible areas.
8. Large quantities of uniform boxes may be arranged in simple stock layouts.
9. Small quantities of different sized items should be positioned in short rows and bins or on box pallets and racks.
10. Layout of aisles should be wide enough to allow for movement of machinery and equipment such as fork lift trucks used in the movement of goods throughout the warehouse.
11. A minimum amount of aisles should be planned but aisles should reach all parts of the warehouse, thus allowing for more storage space.

A warehouse layout must include the following spaces: dock, receiving, checking, marking, stocking, packing, shipping, and office areas. The marking area may be divided into two areas for marking goods as they arrive as well as when they are shipped. Special storage areas may be included besides the general stock area. Vaults for valuables, cold storage for perishables, and stockyards for building materials are some examples.

QUESTIONS

1. What is the most important consideration in planning a warehouse layout?

____

2. What are two methods of using storage space in a warehouse?

____

3. What limits vertical storage space?

(1) ____

(2) ____

4. What limits horizontal storage space?

(1) ________________________________

(2) ________________________________

5. List below special considerations to be made in determining storage space for the following items:

(A) Apples ________________________________

(B) Washing Machines ________________________________

(C) Watches and Rings ________________________________

(D) Light Bulbs ________________________________

(E) Fire Crackers ________________________________

Below is a list of products stored in one warehouse. Select two factors that apply to each item.

Example: Bread __A__ __B__

A. Stored near shipping area
B. Protected from large temperature changes
C. Stored in locked area
D. Stored on racks or bins

Products

1. watches ______ ______
2. auto tires ______ ______
3. apples ______ ______
4. fire crackers ______ ______
5. anti-freeze ______ ______
6. furs ______ ______
7. ice cream ______ ______
8. shoes ______ ______
9. nuts & bolts ______ ______
10. washing machines ______ ______

A. Protected from abrupt temperature changes
B. Stored in locked areas or cages
C. Stored on shelves to protect item
D. Special safety protection needed
E. Stored on shelves by size
F. Stored in bins by size
G. Stored on pallets
H. Stored near shipping area
I. Stored in crates for protection
J. Stored at rear of warehouse

Design a warehouse layout to store all of the products above. Include and label all areas in the warehouse, such as the dock, receiving, etc. Use a blank sheet of paper or posterboard, ruler, and magic marker. You may include pictures or illustrations of products in your layout. Name and show ten warehousing careers in your layout that would be employed in your warehouse.

DESIGNING A WAREHOUSE

#52

Each group is responsible for designing a simple layout of a warehouse which will store the following items:

1. An assortment of nuts and bolts
2. men's shoes which are resold every three days
3. oil burners which are sold only during the fall
4. jewelry

Design your layout using Handout #51 as a guide. The following information will aid you in completing this assignment.

A. You will need more space for storing oil burners and shoes than nuts, bolts, and jewelry.

B. You will need to list the following things in your layout.

   1. How will you store each item — will you use pallets, shelves, racks and bins, locked storage areas, etc. This must be listed for each product.

   2. Note your receiving and shipping areas in your layout.

   3. List the method of transporting items such as by hand or fork lift trucks.

   4. Show your aisles within the warehouse.

C. Refer to Handout #51 to determine type of product and method of storage (Vertical or Horizontal storage).

D. Include all areas in the warehouse, such as the dock, checking, and special storage areas.

E. Complete your layout as a group. Elect a chairman to explain what you've done to the class.

F. Name ten marketing career opportunities that could be available in this warehouse.

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

6. ______________________________

7. ______________________________

8. ______________________________

9. ______________________________

10. ______________________________

WHAT GOES WHERE IN THE WAREHOUSE #53

You are on the board of directors for the Morgan Marine Wholesaling Company. The company is planning on building a new warehouse because of its fast growth rate and the demand for marine supplies. You are at a board of directors meeting and have been given a report on the new planned warehouse. The report is as follows:

The Morgan Marine Wholesale Company is to build a new two-story warehouse for storage of marine supplies. The company researchers have decided on a two floor warehouse located in a newly developed industrial park close to modern highway and rail transportation systems. The proposed layout consists of the first floor storing larger items like outboard motors and marine plywood. These items will be stored on shelves, bays and other assigned storage areas. The ceiling height on each floor will be 7½'. Three large freight elevators are planned to transport items to the second floor. Cases of oil, grease, brass fittings, nuts & bolts, marine paint and other smaller supplies will be stored on the second floor by use of racks and shelves. Fork lift trucks will be purchased for both floors. Fork lift drivers will deposit items on elevators and the merchandise will be unloaded and stored by fork lift drivers on the second floor. Intercom systems are planned to communicate between each floor to prevent a mix-up in receiving or sending out merchandise from the second floor.

You listen to this report and ask why not build a single floor warehouse with a floor space equal to that of the two story structure and a ceiling height of 15'.

QUESTIONS:

(1) What would be your reasons for suggesting a one floor warehouse?

(2) Which would be best – a one or two story warehouse? Why?

WAREHOUSE DECISIONS

#54

Each of the items below are stored in one warehouse:

1. apples and lemons
2. anti-freeze sold during fall and winter
3. auto tires shipped daily
4. men's wrist watches

Decide the following for each item:

1. Would the warehouse be one or two floors? ______________________________
2. Which item should be stored in the *least* accessible part of the warehouse? ______________________________
3. Which item should be protected against temperature changes? ______________________________
4. Which item would be stored on pallets? ______________________________
5. Which item would be stored in bins or crates? ______________________________
6. Which item would be stored near the shipping area? ______________________________
7. Which items would be stored on shelves? ______________________________
8. Decide where you would store each item on the diagram below and include aisles.

WARHOUSE LOCATION #55

In determining the actual site location of a warehouse, many factors must be considered. Most modern warehouses are large one floor buildings located outside of cities and towns where land is least expensive. Warehouses must be located near the sources of transportation used in transferring the merchandise in and out of the warehouse. Primary highways, railroads, and airports and other transportation services must be considered. By using one floor construction, elevators and floor space is saved; construction costs are cheaper and less movement of goods is accomplished, thus saving on overall capital spent for construction.

Some of the considerations that must be made are listed below. Study these as if you were determining a site location.

1. Type of merchandise stored
2. Methods used to transport merchandise
3. Availability of local transportation services
4. Cost of land
5. Local property tax structure
6. Distance from customers and suppliers
7. Availability of power, water, and communications
8. Availability of local labor
9. Availability of building materials
10. Type of construction
11. Other considerations

WAREHOUSE OWNERSHIP

INSTRUCTIONS – Cover answers at right before reading questions. As student proceeds down the page, moving the cover sheet, answers will emerge.

1. Modern Warehousing is designed to meet needs for efficient, fast distribution of goods.
TRUE FALSE

True

2. Warehouses are classed as to ownership or types of merchandise stored. Warehouses are first classed as to the type of ______________________.

Ownership

3. Warehouse ownership is either public or private. Public owned warehouses lease storage space to independent businesses. Warehouses are either ______________________ or ______________________ owned.

Publicly
Privately

4. A public warehouse leases storage space to other firms. Customers of a public warehouse are charged for the amount of cubic space occupied by the goods; length of time goods are stored and handling; or processing done to goods while they are in storage. A public warehouse will rent or ______________________ space to other businesses.

Lease

5. Customers using public warehouses are charged for the amount of cubic space occupied by the goods, length of time goods are stored and handling or processing done to the goods while they are in storage. Customers pay not only for the space they occupy but also for the length of ______________________ goods are stored and any ______________________ or ______________________ done to the goods while they are in storage.

Time
Handling
Processing

6. Public owned warehouses are divided into different types depending on the type of merchandise stored. Types of public warehouses are: General Merchandise: Special Commodity; Cold Storage and Bonded, Public owned warehouses are divided into different types depending on the type of ______________________ stored.

Goods

7. General Merchandise includes manufactured and non-manufactured goods. Special Commodity Warehouses store one type of agricultural products, such as grain, cotton or wool and offer services related to that commodity. Manufactured products are stored in ______________________ warehouses and oats may be stored in a ______________________ warehouse.

General Merchandise
Special Commodity

8. In addition to General Merchandise and Special Commodities warehouses, there are Cold Storage and Bonded warehouses. Cold Storage warehouses store highly perishable food items such as strawberries and peaches as well as longer lasting foods such as apples, eggs and meats. Apples or other perishable food items will be stored in a ________________ ________________ warehouse.	Cold Storage
9. The last type of warehouse is called a Bonded warehouse. Bonded warehouses store products that require payment of a federal tax. Items such as tobacco and tobacco products and alcoholic beverages are the two primary products stored in a bonded warehouse. ________________ warehouses store products which require payment of a ________________.	Bonded Federal Tax
10. Warehouses are classed as to the type of ________________ stored. Four main types of warehouses are (1) ________________ (2) ________________ (3) ________________ (4) ________________	Merchandise General Merchandise Special Commodity Cold Storage Bonded
11. Businesses may also own their own warehouse. These private warehouses are managed and operated by a company for its own use. Manufacturers, wholesalers and retailers may have their own private warehouse. A ________________ warehouse is owned by a private business and is used for storage of its own products.	Private
12. Private warehouses may be owned by manufacturers, ________________ and retailers.	Wholesalers
13. A public warehouse rents space to other businesses for storage, whereas a ________________ warehouse is used solely for storage of that company's products.	Private

I. Match correct type of warehouse with the product stored there.

______ 1. Beef

______ 2. Radios

______ 3. Tables

______ 4. Apples

______ 5. Light Bulbs

______ 6. Hardware

______ 7. Wheat

______ 8. Notebook Paper

______ 9. Canned Goods

______ 10. Cigarettes

A. General Merchandise

B. Cold Storage

C. Special Commodity

D. Bonded

II. Define:

A. Public Warehouse ______________________________

B. Private Warehouse ______________________________

C. Bonded Warehouse ______________________________

III. In determining a location for a warehouse designed to store building materials, such as lumber, what are five important factors to decide?

1. ____________________ 3. ____________________ 5. ____________________

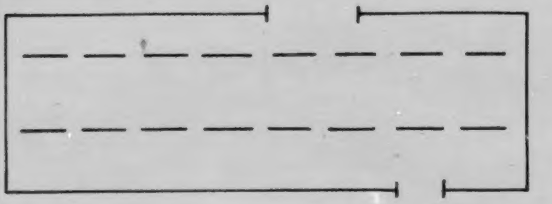
2. ____________________ 4. ____________________

WAREHOUSING PRODUCTS ACTIVITY

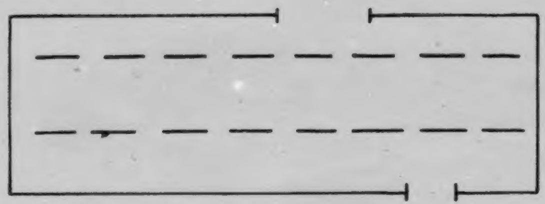
Identify the four types of warehouses:

1. ______________________________ 2. ______________________________

(This warehouse stores manufactured and non–manufactured goods)

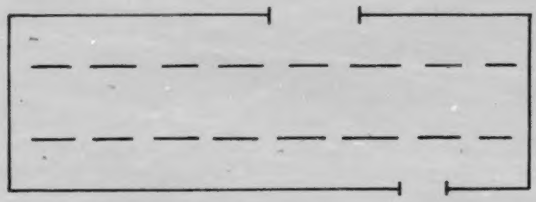


(This warehouse stores one type of good)

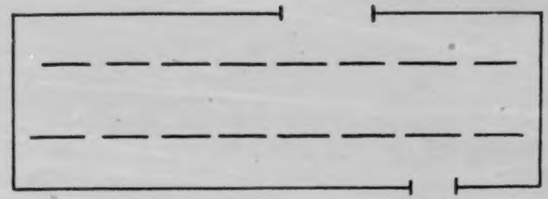


3. ______________________________ 4. ______________________________

(This warehouse is refrigerated)



(This warehouse stores fine jewelry)



Now that your warehouses are identified, read the product descriptions below and place the letters on the blanks provided in the appropriate warehouse.

A. This product will be used to make bread.

B. This product has diamonds in it.

C. This product is individually wrapped and will last for many years.

D. This product will spoil after 5 days.

E. This product will be used for fruit cocktail.

F. This product will be used to make dresses.

G. This product is made of gold.

H. This product is boxed in styrofoam packing.

I. This product may be eaten for breakfast.

J. This product will rot in 2 weeks.

K. This product is made of silver.

L. This product is a radio.

M. This product is used with a bolt.

N. This product is fed to cattle.

O. This product is worth $2,000 and is kept in a locked area.

P. This product has an electric motor.

Q. This product is a gun.

R. Chickens lay this product.

S. Cows give this product.

T. This product grows on a peach tree.

U. You are using this product to write with.

V. This product was manufactured at General Telephone.

W. This product might be eaten for dinner.

X. This product is an automobile tire.

Y. This product is made by Tampa Cigar Company.

Z. This product has a Federal Tax.

#63

THE 3--C's OF CREDIT

CHARACTER — business' sense of responsibility toward paying its bills.

CAPACITY — business' ability to earn money; does it have a steady income.

CAPITAL — business' wealth, does it have collateral, cash on hand.

Wholesalers offer a variety of dating terms to their customers for the payment of merchandise. The most common terms include:

EOM – payment is due the number of stated days from the "end of the month" in which the invoice is dated.

ROG – billing is calculated from the "receipt of goods" date rather than invoice date.

Extra Dating – time for payment is extended a certain number of days, (usually 30, 60, or 90) from the date given.

Postdating – additional time provided for payment by dating the invoice after the goods have been shipped.

N.30 – payment is due thirty days from the date of the invoice.

2/10 – two percent discount is allowed if payment is made within ten days of the invoice date; percentages indicated by the first number may vary.

Credit Applicant's are judged according to three major factors:

a. *Character* – firm's sense of responsibility

b. *Capacity* – company's ability to pay

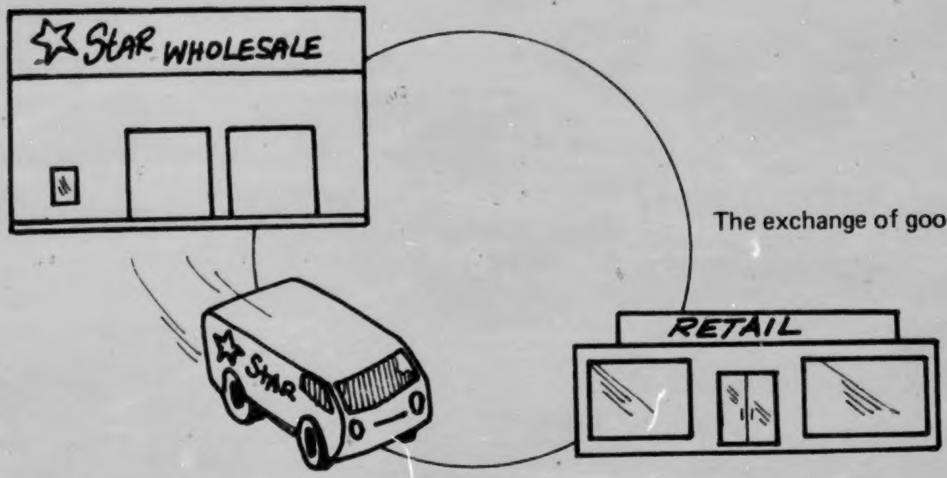
c. *Capital* – business' wealth

CHARACTER – is the most important of the 3 C's. How dependable is the retailer? Does he pay his bills on time or more importantly do they ever get paid in full?

CAPACITY – means his earning power. Is his business in good enough condition to keep going for awhile or maybe even expand? If not the wholesaler may be in trouble.

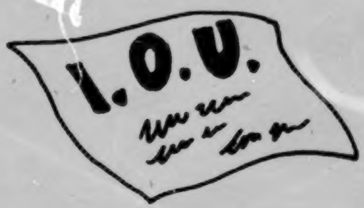
CAPITAL – is all of the tangible (material) things that the retailer owns. His stock, building, equipment, land, cash, etc. This is the wholesalers protection against financial difficulties.

– Credit –

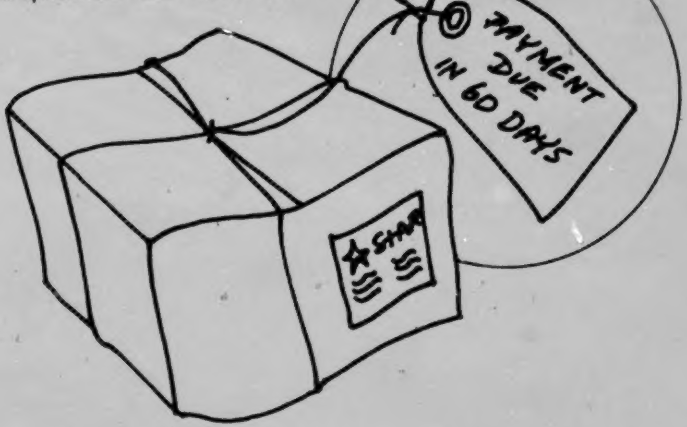

STAR WHOLESALE
STAR
RETAIL

The exchange of goods . . .

. . . on the basis of a promise to pay . . .



. . . on some specified future date . . .


PAYMENT DUE IN 60 DAYS
STAR

The credit manager who determines credit must have 3 things:

A banker's respect for money
A detective's ability to sense dishonesty
A salesman's appreciation for a good customer

ADVANTAGES IN OFFERING CREDIT

1. Convenience to business customers
2. Smooths out irregularities in purchasing
3. Increases number of purchases per customer
4. Produces sales that might never have been reached

Possible Paths of a Business with Credit and One Without Credit

NO–Credit	Situation	Credit
No cash reserve to order emergency supplies	Hurricane in August	Orders on Credit Emergency Supplies
Uses all available cash to buy nails before strike	Steel Strike in September	Orders on credit large quantity of nails before strike
Unable to do anything because all cash used up	Truckers walk-out in October	Stocks up on all items before walk-out
	Write-in possible situations and there consequences	

ARTIFICIAL CHRISTMAS TREES

Montgomery Hardware is a retail store located in South-eastern Florida. In early December, Montgomery wants to order from Starr Wholesalers, 200 artificial Christmas trees for resale to its customers. Unfortunately, Montgomery is low on cash because of the very slow summer months in this area.

Show how credit can smooth out the purchasing power of Mongtomery Hardware.

A major storm is about to strike the area in which your hardware store is located. Since it is a Saturday the banks are closed, but you are in desperate need of flashlight batteries for your customers.

Starr Wholesalers can make immediate delivery.

Tell how credit is a major convenience to you in this situation.

Using the information provided on the following credit application form, check the appropriate box concerning the acceptance or denial of credit and give reasons for acceptance or denial.

Date Dec. 31, 1974

Name of Firm Montgomery Hardware

Address	1029 E Darby	Sulphur	Okla.	33301
	street	city	state	zip

Phone 631-8724

Previous Year Dollar Sales	$10,000
Previous Year Liabilities	15,000
Previous Year Capital	5,000
Current Year Dollar Sales	9,000
Current Year Liabilities	20,000
Current Year Capital	4,500
Dollar Value of Tangible Assets	$ 5,000

Credit Acceptance ☐

Credit Denial ☐

Reasons for Acceptance or Denial:

Careers Involved:

1. ______________
2. ______________
3. ______________
4. ______________

WHOLESALE CREDIT CUSTOMERS

#64

Using the information provided on the following credit application form, check the appropriate box concerning the acceptance or denial of credit and give reasons for acceptance or denial.

Date Dec. 31, 1974

Name of Firm Montgomery Hardware

Address	1029 E Darby	Sulphur	Okla	33301
	street	city	state	zip

Phone 631-8724

SALES	1973 – $15,000	1974 – $10,000
ASSETS	1973 – 20,000	1974 – 10,000
LIABILITIES	1973 – 10,000	1974 – 9,000
CAPITAL	1973 – 10,000	1974 – 1,000

Character References: Not Available

Credit Acceptance ☐

Credit Denial ☐

Reasons for Acceptance or Denial:

Wholesale Credit Careers Involved:

1.
2.
3.
4.

#64

Using the information provided below, write the phrase from the paragraph in the space which best describes the advantage of offering credit to retailers.

Montgomery Hardware Store has its bookkeeping office in another building eight blocks from the main store. ① Five days before the "Fourth of July Celebration", Mr. Montgomery was told by his bookkeeping department that the business had a cash balance of $500.00 and the smallest lot of fireworks available from Starr Wholesalers, Inc. was a $575.00 package. Fortunately for Mr. Montgomery, his store had a credit account with Starr, Inc.

② Mr. Montgomery merely phoned in his order for one package of fireworks and received immediate delivery. ③ While talking to the salesman, Mr. Montgomery decided to also purchase 12 dozen sparklers, currently on sale at Starr and ④ told the buyer to hold another package of fireworks for him in case he sold a great deal of the first package in a short time.

1. Convenience to Retailer

____

____

2. Smooths out irregularities in purchasing power

____

____

3. Increases number of purchases per retailer

____

____

4. Produces sales that might never have been reached

____

____

#56

CAREERS IN WHOLESALE FINANCE

The Marketing function of finance handles the credit and control activities of a wholesaler.

The credit and control activities in which a wholesaler engages include:

a. offering credit to customers.
b. maintaining and collecting credit accounts.
c. handling and controlling receiving, shipping and checking reports.
d. paying the bills of the wholesaler.
e. handling the wholesaler's payroll.
f. controlling the costs of doing business.

Many career opportunities are available in finance with the wholesaler:

Accounting Manager	establishes and maintains accounting systems for the business.
Accounts Payable Clerk	figures payments and dates due on goods bought by the business.
Credit Authorizer	approves or disapproves credit customers, limits, and extensions.
Comptroller	directs all financial activities, reports, and personnel of the business.
Credit Clerk	payments on accounts, handles various credit activities.
Credit Collector	contacts delinquent accounts to obtain money owed to the business.
Credit Investigator	checks past history and current status of business applicant's character, capacity, and capital.
Credit Manager	supervises all credit and collections employees and activities for the firm.
Inventory Control Clerk	keeps records of merchandise by size, style, color, price, etc.
Accounts Receivable Clerk	calculates dates, discounts, and payments for customer accounts.
Merchandise Control Manager	supervises inventory control activities for the wholesaler.
Payroll Clerk	records employee working hours and figures the payroll.

FINANCE FEEDBACK

#57

John Marcus, comptroller of The Wholesaler, has just been notified by the general manager that he must distribute raises to the credit and control personnel under his direction. The personnel are being rewarded for the increased reliability on charge account payments and the realistic budgets and accounting procedures which have been developed. John must divide the raises among the twelve employees listed below. He has decided to break it up in the following manner:

2 – $10 week 3 – $20 week 3 – $30 week 2 – $40 week 2 – $50 week

Place the dollar amount next to each name below to show how you evaluate each person's importance in the credit and control department.

______	Accounting Manager	establishes and maintains accounting systems for the retailer
______	Accounts Payable Clerk	figures payments and dates due on goods bought by the business
______	Comptroller	directs and controls all the financial personnel and activities
______	Credit Authorizer	approves or disapproves credit applicants and additional purchases
______	Credit Clerk	greets customers, accepts payments on accounts, handles various credit activities
______	Credit Collector	contacts delinquent accounts to obtain money owed to the retailer
______	Accounts Receivable Clerk	calculates dates, discounts, and payments of customers
______	Credit Investigator	checks past history and current status of applicant's character, capacity, and capital
______	Credit Manager	supervises all credit and collections employees and activities for the firm
______	Inventory Control Clerk	keeps records of merchandise by size, style, color, price, etc.
______	Merchandise Control Manager	determines merchandise to be marked down and reordered according to records
______	Payroll Clerk	records employee working hours and figures the payroll

ALPHABET ACTION*

#58

Participants

2 Teams
1 Moderator

1 Timer
1 Scorekeeper

Preparation

Develop a gameboard similar to the one on the next page or design a set of alphabet cards with the numbers 1-26 on the back in random order. If you use a set of alphabet cards, arrange them with the numbers showing on a bulletin board or pegboard.

Directions

Divide the class into two teams and have each team select a captain. Select a moderator, scorekeeper, and timer. The teacher should serve as the judge. Flip a coin to determine which team will begin the game.

Explain to students that each team will try to make career titles from the unit with letters they uncover. The first player selects a number and that number's letter is revealed. He must then decide how many other numbers he wants to select. He must form a career title from the unit with each group of letters in ten seconds.

If one letter is selected and a correct career title is given, the team earns one point. If a career is formed using three letters revealed, the team gains three points, and so on. If the team player does not form a career title with the revealed letters, his team loses one point regardless of the number of letters attempted.

When a team player correctly forms a career title from letters uncovered, he may earn a bonus two points for his team by explaining what that career person does. His team is not penalized for an incorrect description.

No career title may be developed from letters more than once in a game. The game winner may be decided by a time limit, such as fifteen minutes. Game may be declared for 50 total points earned, or by all of the career titles being formed.

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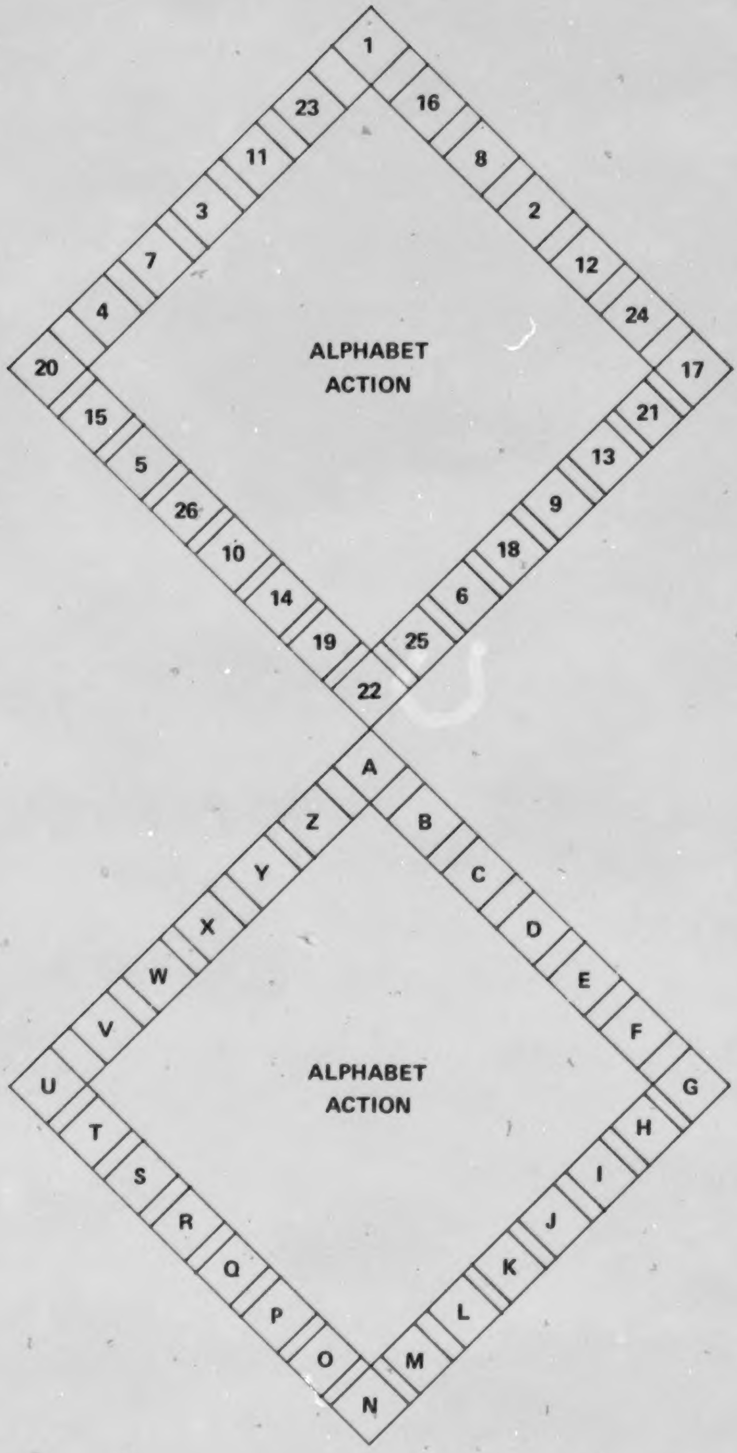
ALPHABET
ACTION
1
16
8
2
12
24
17
21
13
9
18
6
25
22
19
14
10
26
5
15
20
4
7
3
11
23
ALPHABET
ACTION
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V
W
X
Y
Z

FINANCE FISH*

#59

Participants

2-3 Players (one player serves as the dealer)

Preparation

The purpose of the Finance Fish card game is to review and reinforce the wholesale finance careers available and the job functions that each of the career personnel perform. To prepare for the card game one job title card and one job duty card should be developed for each of the twelve customer wholesale finance occupations below:

Accounting Manager
Accounts Payable Clerk
Accounts Receivable Clerk
Comptroller
Credit Authorizer
Credit Collector
Credit Clerk
Credit Investigator
Credit Manager
Inventory Control Clerk
Merchandise Control Manager
Payroll Clerk

Two colors of posterboard, cardstock, or construction paper should be used so that the job title cards can be distinguished easily from the job duty cards.

Directions

The dealer gives each player four or six job duty cards, so that all of them have been distributed. He then deals each player two job duty cards. The rest of the job duty cards are placed in the middle of the table to form the finance fish deck.

Each player checks the cards in his hand for possible matches of job title and job duty cards and puts them together in his hand. Next, each player should study the other job duty cards to determine which job title cards he needs. A small notepad would be helpful to keep track of job duty and job title cards needed.

The game is begun by the dealer. He places any matched pairs of job duty and job title cards on the table in front of him. If he has laid down a correct match, he proceeds with his turn. If he has incorrectly matched a job duty card and job title card, he loses his turn.

If no match was placed on the table or if cards were correctly matched, the dealer selects any other player and asks him for a needed job title card. If the player asked has that card, he gives the dealer that job title card. The dealer places the matched pair on the table and earns an extra turn. An extra turn is earned for each match obtained by getting a card from another player.

If the player asked does not have the job title card which the dealer requested, he says, "fish." The dealer draws the top card from the job hunt deck and places it in his hand. If the job title card he drew matches a job duty card in his hand, he lays the pair on the table in front of him. If he drew the job title card which he requested from the other player to form the match, he receives an extra turn. Otherwise, his play is over.

Whenever a player places a matched pair of cards on the table, he must read the name on the job title card and the description on the job duty card to the other players for their approval. If it should be an incorrect match, the player loses his turn. In addition, he must return the job title card to the bottom of the finance fish deck.

The game continues with the player to the dealer's right and proceeds around the table to the right. Play continues in the order explained above until the finance fish deck of job titles is gone. From this time on, a player's turn ends when he asks another player for a job title card and is told to "fish." The first player to get rid of all the cards in his hand wins the game.

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Sample Game Cards

JOB TITLE	JOB DUTY
CREDIT MANAGER	Supervises all credit and collections employees and activities.
COMPTROLLER	Directs all financial personnel and activities for the wholesaler.
ACCOUNTS PAYABLE CLERK	Figures payments, discounts and dates due on goods bought by the business.

FINANCIAL HOROSCOPE

#60

Read each of the twelve horoscopes below and decide which wholesale finance career you think would best match that horoscope. You should have a different career for each one. When you are finished, answer the questions following the last horoscope.

ARIES (March 21-April 19)

You are best suited for a job where you meet people. You are clever and quick and can make good use of it. A position of authority is ideal. You will make good wherever there is a need for someone with decision-making qualities. Arians make good ____________

TAURUS (April 20-May 20)

Mathematical work is always part of the Taurean temperament, because you have an eye for figures and what is likely to please the senses. Often you have difficulty talking to strangers due to circumstances and environment. You would do well as a ____________

GEMINI (May 21-June 21)

You are active and industrious and like interesting and varied work. You are best suited to a job which makes full use of your intellectual learnings. You are naturally inquisitive and like talking and imparting knowledge. You have a sense of humor and an easy manner. People born under this sign make excellent ____________

MOONCHILDREN (June 22-July 21)

Any work in an office is ideal for you. Intuition is a great help to you in business and often you make your most important decision on the basis of feeling as well as reason. Your ability to judge values and analyze problems and people correctly gives you the extra touch needed to excel as a ____________

LEO (July 22-August 21)

You are best suited to work where you have sole authority. You will do well in executive positions, for you have the natural command of any situation. You have the ability to give orders and you speak well. Although you run the risk of being overcritical, people working for you always respect you, do their best willingly, and really make an effort to please and serve you. You may find your calling as a ____________

What is the meaning of the

zodiac

ZODIAC is the name of an imaginary belt in which the moon and planets travel. The belt extends 8° on each side of the ecliptic, or the sun's apparent path around the earth.

♈ **Aries** – March 21-April 20 – The sign of the Ram. **Birthstone:** Diamond. **Best Color:** Red. Charming manners, courageous, dynamic personality, energetic.

♉ **Taurus** – April 21-May 20 – The sign of the Bull. **Birthstone:** Sapphire. **Best Color:** Blue. Good personality, easy going, good worker.

♊ **Gemini** – May 21-June 21 – The sign of the Twins. **Birthstone:** Emerald. **Best Color:** Silver. Active mind, generous, good sense of humor, very patient.

♋ **Cancer** – June 22-July 22 – The sign of the Crab. **Birthstone:** Pearl. **Best Color:** White. Fond of travel, imaginative.

♌ **Leo** – July 23-Aug. 22 – The sign of the Lion. **Birthstone:** Ruby. **Best Color:** Gold. Good imagination, good memory, magnetic personality.

♍ **Virgo** – Aug. 23-Sept. 22 – The sign of the Virgin. **Birthstone:** Onyx. **Best Color:** Grey. Courteous, neat, honest, trustworthy, fond of sports.

♎ **Libra** – Sept. 23-Oct. 22 – The sign of the Balance. **Birthstone:** Chrysolite. **Best Color:** Blue. Kind, generous, enjoys dancing.

♏ **Scorpio** – Oct. 23-Nov. 21 – The sign of the Scorpion. **Birthstone:** Topaz. **Best Color:** Dark Red. Loyal, patient, courteous, dependable.

♐ **Sagittarius** – Nov. 22-Dec. 21 – The sign of the Archer. **Birthstone:** Turquoise. **Best Color:** Purple. Patriotic, trustworthy, studious, likes art and music.

♑ **Capricorn** – Dec. 22-Jan. 19 – The sign of the Goat. **Birthstone:** Zircon. **Best Color:** Dark Green. Good disposition, trustworthy, enjoys travel.

♒ **Aquarius** – Jan. 20-Feb. 18 – The sign of the Water Bearer. **Birthstone:** Garnet. **Best Color:** Blue. Honest, loyal, good memory, good learner.

♓ **Pisces** – Feb. 19-Mar. 20 – The sign of the Fish. **Birthstone:** Amethyst. **Best Color:** Lavender. Kind, patient, good judgment, conscientious.

VIRGO (August 22-September 22)

The right kind of work is important if your mind is to develop along the proper course. You may have many ups and downs in your struggle for security, but you will come out on top through effort and hard work. You have many ideas and you try to perfect them all. You may work as a ____________________

LIBRA (September 23-October 22)

You have a high intellect and can understand anything up to the most complicated financial problem. You can analyze, explain and pass judgement on all sorts of difficulties, with complete detachment. You are ideally suited for work as a ____________________

SCORPIO (October 23-November 21)

You have great powers of concentration and are always able to find energy when you need it. There is often a streak of genius in your nature and you are extremely resourceful. In any job you take on you never compromise or take the middle path, for you are capable of exacting work. You should excel in finance as a ____________________

SAGITTARIUS (November 22-December 21)

The urge to be active is very strong in your make-up. You do not like being confined to one spot. You like to work where you meet people and enjoy some physical exercise in a job. The job for you in wholesale finance is ____________________

CAPRICORN (December 22-January 20)

You are a natural at routine and detailed work. You like to know what to expect in a job. You are good with numbers and paperwork. You are very organized and strive for perfection in all your efforts. You'll do well as a ____________________

AQUARIUS (January 21-February 19)

You are most suitable for work involving records of goods. You do well in organizing and recording information. You also possess a particular aptitude for interpreting information gathered. You will do well as a ____________________

PISCES (February 20-March 20)

Your main aim in life is to be successful. The work you select should provide you with the opportunity to be a leader. You are happy doing detailed work where much concentration is desired. The best area in finance for you is ____________________

What finance careers did you predict for your zodiac sign?

____

Which of these careers do you think you might like to follow? Why?

____

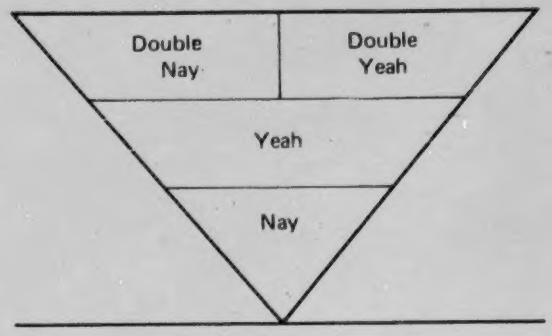
____

In which of these jobs would you definitely not want to work? Why?

____

____

YEAH-NAY TOSS*



Place a large triangle like the one above on the floor and secure with masking tape. 20-25 ft. back from the tip of the triangle place another strip of tape for a playing line. 2 or 3 teams are chosen and the players take turns tossing a bean bag for their team.

One team plays at a time and answers according to the section their toss landed in.

DOUBLE NAY – THE TEAM MUST ANSWER AND ITS ANSWER COUNTS DOUBLE EITHER FOR OR AGAINST THEM.

NAY – THE TEAM ANSWERS AND IT COUNTS THE REGULAR SCORE FOR OR AGAINST THEM ACCORDING TO THEIR ANSWER.

YEAH – THE TEAM GETS THE REGULAR SCORE FOR THEMSELVES WITHOUT HAVING TO ANSWER A QUESTION.

DOUBLE YEAH – THE QUESTION IS GIVEN TO THE OPPOSING TEAM AND IF THEIR ANSWER IS CORRECT THE TEAM WHO TOSSED GETS DOUBLE FOR AND IF THE ANSWER IS INCORRECT THE TEAM ANSWERING GETS DOUBLE OFF.

The game ends when the first team reaches a predetermined score, such as "21".

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WHOLESALE JEOPARDY*

#65

1 – Scorekeeper

3 – Panelists or teams

1 – Moderator

2 – Judge/Authority

– – All students submit at least three questions for each of the given categories

CATEGORIES OF INFORMATION

POINT VALUES	A	B	C	D	E
	1	1	1	1	1
	2	2	2	2	2
	3	3	3	3	3
	4	4	4	4	4
	5	5	5	5	5

Directions

1. Four to six categories of information are selected for a unit or course. Authorities prepare the final copies of questions and answers.

2. Questions and answers are selected for each of the categories and are arranged in order of difficulty (1—least difficult; 5—most difficult).

3. A panelist receives the number of points related to questions he answers. The panelist with the most points at the end of the game is declared the winner and meets two new challengers for a new game.

4. Time limit per game – 15 minutes. Panelist or team with the most points wins.

5. Game is begun by each panelist or team representative drawing a slip of paper from a box. Each slip is marked 1, 2, and 3. The panelist or team member drawing the #1 slip begins the game.

6. The panelist or team member then selects the category and point value of the question he wishes the moderator to read.

7. The moderator reads the chosen question. When the panelist thinks he has the correct answer, he rings his bell. The first panelist to ring his bell is given the opportunity to answer the question. If his answer is correct, he receives the corresponding points. If his answer is incorrect, he does not receive any points, and his opponents receive the opportunity of ringing their bells to give the answer. The first panelist to ring answers the question. If none of the panelists give a correct answer, the last person to answer correctly will select the next category and point value question. Each succeeding question (category and point value) will be selected by the last panelist giving a correct answer.

8. Blocks representing a category and point value (such as B-2) should be blocked out with an "X" on the blackboard or an overhead transparency to keep the students informed of the remaining categories and point value questions. If a bulletin board or pegboard are used, cards for each category and point value may be removed as they are selected by panelists.

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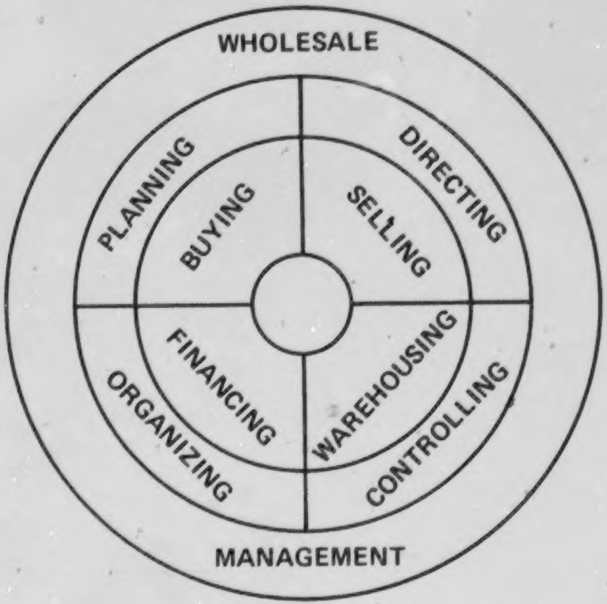
MANAGEMENT: "THE WHOLESALE WAY"

#66

You have now looked at the eight major functions involved in wholesale distribution. You have seen how they all work separately and yet are connected. The connecting force is marketing management. Management establishes the goals of the business; plans what to do, when to do it, as well as how and by whom it will be done; outlines work procedures; and sets up controls to make certain that the work is done correctly.



Many career opportunities are available in wholesale management with all kinds of wholesale distributors. As you can see from the list below, there are a wide range of titles. These are classified by management levels. Can you identify the kind of business with which each of them is associated? Are there any differences in the degrees of responsibility that these people have?

Some of the wholesale management/specialist careers frequently found include:

Supervisor/Mid-Management

Accounting Manager
Credit Manager
Receiving Supervisor
Purchasing Manager

Route Supervisor
Sales-Service Manager
Warehouse Manager
Sales Promotion Director

Specialist

Advertising Man
Sales Engineer
Head Buyer
Marketing Research Analyst

Public Relations Man
Resident Buyer
Sales Promoter
Specialty Buyer

Executive

Comptroller
Company President
General Manager
Merchandise Manager
Operations Manager
Vice-President

The Management careers listed can actually be divided into three career levels: executive, mid-management or supervisory, and specialist. An *executive* manager is a person responsible for major decisions within a business or organization to coordinate and direct its activities. He may be the only executive manager of a business, as in the cases of small wholesale owner-manager or a local warehouse supervisor. He may share this responsibility. A wholesale corporate president is supported by other officers such as a general manager, executive vice-presidents, and a comptroller. Each of these people accept major roles in their organization to plan, organize, direct, and control activities, etc.

The *mid-management* level, often referred to as the supervisory level of management, involves the coordination of activities for a smaller, more specific area of the business. Usually, this is a department or division. Examples of mid-management positions include a credit manager, packing supervisor, sales director and a purchasing manager within a large wholesale company.

The *specialist* in wholesale management is a highly-trained, knowledgeable person who provides valuable information and makes important decisions affecting the business. However, the primary importance of his career does not center around the actual supervision of people, although he may be responsible for overseeing the activities of these employees. Some of the interesting specialist careers in wholesale management include: the marketing research analyst, the sales engineer, the advertising man, the specialty buyer, and the public relations man. Can you think of some others?

As you can see, if the management of a business fails, most likely the business will fail as well. In fact, the United States Small Business Management Association recently stated that 92% of all business or organization failures are a direct result of poor management!

How does a person get into management? There are several ways. One is referred to as "coming up through the ranks." This statement simply means starting at an entry level position and with hard work advancing to a management/specialist career. Most outside wholesale sales personnel have spent three to five years working in the warehouse,counter sales, and the office before they call on business customers.

Another method of entering management is through special training. Many businesses take promising young people who are interested in wholesale management and place them in the company's management training programs. These young people may come directly out of a high school, vocational school or Distributive Education program.

You may also get a two or a four year college degree in marketing or management which will qualify you for many supervisory or specialist positions in marketing management. Some junior colleges offer specialized programs in wholesaling which provide you with classroom instruction and occupational experience with a local wholesaler. With experience, you could become an executive.

Some of the more important traits and characteristics of a competent manager are: his ability to organize people and the jobs they are to carry out; understand people and their feelings; be aware of business trends; have an open-mind to new problems; be able to make a decision and stick to it; yet, if proven wrong, be able to admit it and make the necessary adjustments.

A Management Summary

To help you organize your management information, here is a brief overview of what we have just learned about management:

1. Management is the process of coordinating all resources in order to achieve the goals set by a business or industry.

2. The wholesale manager coordinates all business resources by planning, organizing, directing, and controlling all activities to meet the goals of the business or organization.

3. Management careers may be classified by one of three career levels:
   a. *Executives* are responsible for decisions coordinating all marketing activities within a business or organization.
   b. *Mid-Management* involves supervision of activities within a specific department or division of a business or industry.
   c. *Specialists* include highly trained, knowledgeable personnel who provide vital information directly to top management of a firm.

4. The eight major marketing functions or activities may be performed by one person in a wholesale business or by many people.

5. Without proper management, a wholesale distributor has very little chance of success.

6. People who want to become wholesale managers or specialists may choose one of several methods:

   Work his or her way up *through the ranks* beginning at any entry job.

   Enter a *training program* after completing a high school or vocational Distributive Education program as preparation.

   Obtain a two or four year *college degree* in marketing management or wholesaling.

MARKETING MANAGEMENT QUESTIONNAIRE

1. A manager is responsible for doing the work necessary for the business to survive.
True False

2. Marketing management takes place in each of the other marketing functions.
True False

3. Some form of management takes place whenever people work together.
True False

4. Eight marketing functions cannot be performed by a single person.
True False

5. The effectiveness of the management has no effect on the success of the business.
True False

6. The only way to get into management is to get a college degree
True False

7. The marketing activity that connects the functions of buying, selling, market research, standardization, transportation, risk, storage, and finance is the coordinator called marketing ______________________________
____

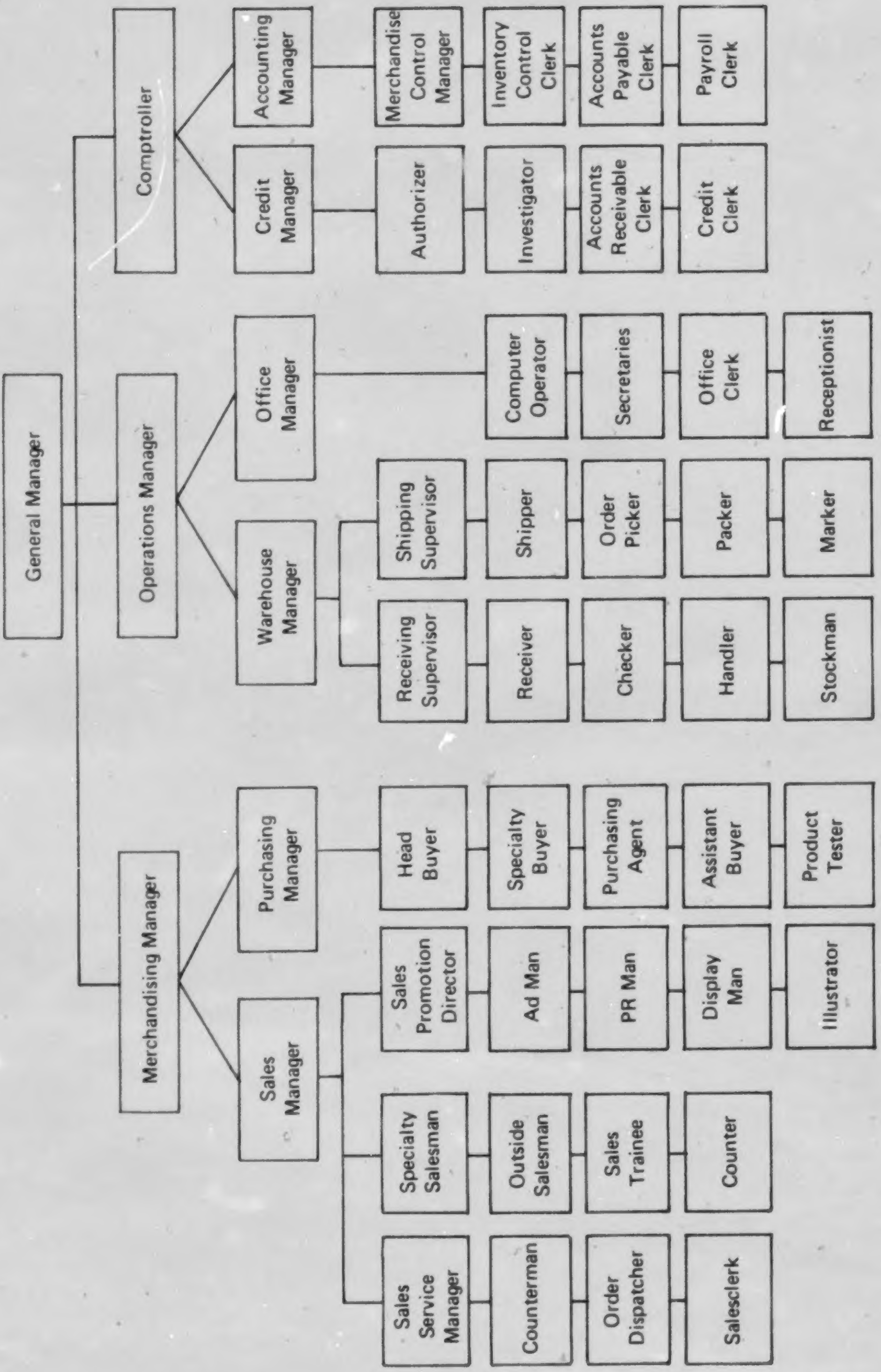
8. ______________________ is the determining of the objectives of the business and the means by which they will be accomplished.

9. When you decide on the responsibilities of the business and assign these responsibilities, you are ______________________ the business.

10. ______________________ is the process of measuring the amount of progress toward the objectives and taking any action necessary to speed this progress; it is the supervision of performance.

11. The process of guiding or leading the company personnel so that they understand their responsibilities in reaching the goals of the business is the management function of ________________.

12. The three career levels of marketing management found in business are: ________________, ________________, and ________________.


General Manager
Merchandising Manager
Operations Manager
Comptroller
Sales Manager
Purchasing Manager
Warehouse Manager
Office Manager
Credit Manager
Accounting Manager
Sales Service Manager
Counterman
Order Dispatcher
Salesclerk
Specialty Salesman
Outside Salesman
Sales Trainee
Counter
Sales Promotion Director
Ad Man
PR Man
Display Man
Illustrator
Head Buyer
Specialty Buyer
Purchasing Agent
Assistant Buyer
Product Tester
Receiving Supervisor
Receiver
Checker
Handler
Stockman
Shipping Supervisor
Shipper
Order Picker
Packer
Marker
Computer Operator
Secretaries
Office Clerk
Receptionist
Authorizer
Investigator
Accounts Receivable Clerk
Credit Clerk
Merchandise Control Manager
Inventory Control Clerk
Accounts Payable Clerk
Payroll Clerk

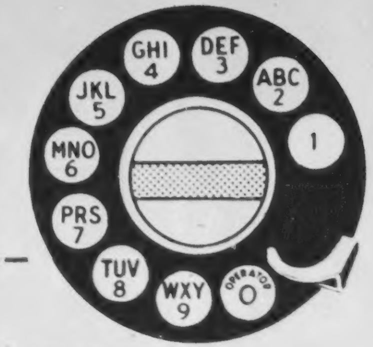
CLASSIFYING MANAGEMENT CAREERS

#67

Executives include those who direct and control the entire business. The Specialists are very knowledgeable, highly-trained marketers who provide important information to management and make important decisions affecting the business. The Supervisor position is responsible for supervising employees and activities for one segment of the business.

Listed below are some wholesale management occupations. For each of the careers listed, check the management level of the position held.

OCCUPATIONS	EXECUTIVE	SPECIALIST	SUPERVISOR
Head Buyer			
Sales Promotion Director			
Operations			
Sales Manager			
Marketing Research Analyst			
Sales-Service Supervisor			
Department Manager			
Advertising Manager			
Corporation President			
Warehouse Manager			
Credit Manager			
General Manager			
Comptroller			
Sales Engineer			
Merchandise Manager			



"DIAL MANAGEMENT"*

Using the numbers on the telephone dial, decode each of the number groups below to reveal sixteen wholesale management careers. Remember, each number represents three letters. For example, the "2" could be letters A, B, or C.

1. 6 7 3 7 2 8 4 6 6 7 / 6 2 6 2 4 3 7	O _ _ R _ _ _ _ N _ / _ A _ _ G _ _
2. 7 2 5 3 7 / 6 2 6 2 4 3 7	_ _ L _ S / _ _ N _ _ _ R
3. 7 2 5 3 7 / 7 7 6 6 6 8 4 6 6 / 3 4 7 3 2 8 6 7	S _ _ E _ / P _ _ M _ _ _ O _ / _ _ R _ _ T _ _
4. 7 7 3 2 4 2 5 8 9 / 2 8 9 3 7	_ P _ C _ _ L _ _ / B _ _ _ R
5. 2 6 6 7 8 7 6 5 5 3 7	_ _ M _ _ R _ _ L _ _
6. 6 2 7 5 3 8 4 6 4 / 7 3 7 3 2 7 2 4 / 2 6 2 5 9 7 8	_ A _ _ _ T _ _ G / _ _ S _ _ R _ _ / _ N _ _ Y _ _
7. 7 3 7 4 3 3 6 8 / 2 8 9 3 7	R _ _ I _ _ _ T / _ U _ _ R
8. 4 3 6 3 7 2 5 / 6 2 6 2 4 3 7	_ _ N _ _ _ L / _ _ N _ _ E _
9. 2 3 8 3 7 8 4 7 4 6 4 / 6 2 6	A _ _ _ R _ _ S _ _ _ / M _ _
10. 7 6 8 8 3 / 7 8 7 3 7 8 4 7 6 7	_ _ U _ _ / S _ _ _ R _ _ S _ _
11. 7 2 5 3 7 / 7 3 7 8 4 2 3 / 7 8 7 3 7 8 4 7 6 7	S _ _ E _ / S _ _ V _ _ _ / _ U _ _ _ V _ _ O _
12. 6 3 7 2 4 2 6 3 4 7 3 / 6 2 6 2 4 3 7	_ E _ _ H _ _ D _ _ _ / M _ _ _ G _ _
13. 9 2 7 3 4 6 8 7 3 / 6 2 6 2 4 3 7	W _ _ _ H _ _ _ E / _ _ N _ _ _ R
14. 7 2 5 3 7 / 3 6 4 4 6 3 3 7	_ _ L _ _ / E _ _ I _ _ _ R
15. 7 8 7 2 4 2 7 4 6 4 / 6 2 6 2 4 3 7	P _ _ C _ _ S _ _ G / _ A _ _ _ E _
16. 2 7 3 3 4 8 / 6 2 6 2 4 3 7	_ R _ _ _ T / M _ _ A _ _ R

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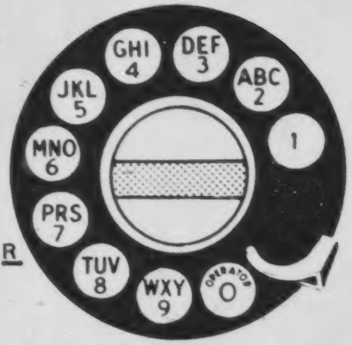
"DIAL MANAGEMENT" – KEY*



Using the numbers on the telephone dial, decode each of the number groups below to reveal sixteen wholesale management careers. Remember, each number represents three letters. For example, the "2" could be letters A, B, or C.

1. 6737284667 / 626437	OPERATIONS / MANAGER
2. 72537 / 6262437	SALES / MANAGER
3. 72537 / 776668466 / 34732867	SALES / PROMOTION / DIRECTOR
4. 773242589 / 28937	SPECIALTY / BUYER
5. 26678765537	COMPTROLLER
6. 627538464 / 73732724 / 2625978	MARKETING / RESEARCH / ANALYST
7. 73743368 / 28937	RESIDENT / BUYER
8. 4363725 / 6262437	GENERAL / MANAGER
9. 23837847464 / 626	ADVERTISING / MAN
10. 76883 / 7873784767	ROUTE / SUPERVISOR
11. 72537 / 7378423 / 7873784767	SALES / SERVICE / SUPERVISOR
12. 6372426347 3 / 6262437	MERCHANDISE / MANAGER
13. 927346873 / 6262437	WAREHOUSE / MANAGER
14. 72537 / 36446337	SALES / ENGINEER
15. 7872427464 / 626437	PURCHASING / MANAGER
16. 273348 / 6262437	CREDIT / MANAGER

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MANAGEMENT BONUS

#69

Jeffrey Thomas, General Manager of All American Wholesale Company, has just been notified that he may distribute Christmas bonuses to employees in the home office and two nearby offices. He has been told to reward them according to their importance to the company. All personnel, whether salaried or on commission, in the same job classification will receive the same bonus.

Mr. Thomas can allocate the following amounts to these numbers of positions:

1 position = $100 2 positions = $75 2 positions = $60 3 positions = $50

3 positions = $ 35 3 positions = $25 2 positions = $15 1 position = $10

If you were Mr. Thomas, what Christmas bonus amount would you give each of the following wholesale personnel according to their importance to the company.

CHRISTMAS BONUS AMOUNT	*ALL AMERICAN WHOLESALE COMPANY PERSONNEL*
	1. Inventory Control Clerk
	2. Specialty Salesman
	3. Order Picker
	4. Credit Manager
	5. Assistant Buyer
	6. Counterman
	7. Receiver
	8. Credit Investigator
	9. Warehouse Manager
	10. Product Tester
	11. Materials Handler
	12. Territory Salesman
	13. Purchasing Manager
	14. Shipper
	15. Salesclerk
	16. Comptroller
	17. Sales Manager

WHOLESALE MANAGEMENT DECISIONS #70

In each of the situations below, people in wholesale management careers are faced with decisions to make. Show how you feel by placing an "X" along the line to indicate your response.

1. If you were a *Merchandise manager* how would you treat a *specialty buyer* who took "payoffs" from a competitor to purchase poor quality goods for sale to your customers?

Boot 'Em Out Buster

Second-Chance Sam

2. The ________________ had talked to his *accounting manager* three times last week about incorrect figures on shipments. The *general manager* has just discovered another report done incorrectly. The accounting manager has an injured leg from the war. How would you feel about firing the accounting manager if you were the comptroller?

Hard-Hearted Henry

Spongy, Soft Susie

3. A *sales manager* noticed one of the company's *Specialty Salespersons* slipping several bottles of expensive perfume into her pocketbook. If you were the sales manager, how would you react?

Tell-All Tessie

Closed-Mouth Clarice

4. The *Merchandise Control Manager* discovered poor accuracy on the unit control cards and called in the *Inventory Control Clerk* to tell him about his failure to complete the records accurately. The inventory control clerk swore at the merchandise control manager and stormed out of the office slamming the office door. How would you handle this situation if you were the merchandise control manager?

Disgusted Dorothy

Laugh-It-Off Lucy

5. The *company president* checked his forms against the inventory to see if the goods marked "damaged" by the *checker* last Tuesday had been returned. When it was discovered the goods had not been shipped, the boss fired the *warehouse receiving manager* for not checking to see it had been done even though he had been out sick two days with the flu. How just do you think the firing was?

Real Ripoff Ricky

Right-On Randolph

FUNCTIONS OF THE WHOLESALE MANAGER

#71

Management takes place wherever people work together. It is not that people require supervision, but that the efforts of people need to be directed along certain lines or patterns with certain controls. The person who manages may be called the boss, supervisor, director, president, or foreman. A form of management exists at school with the principal as the person in charge and the teachers as the people working under him.

The management of a business is not a simple job. With a small wholesaler, each of the eight marketing functions may be performed by one or two persons. In a larger one, however, each of these functions may be performed by different personnel. It is the job of the manager to be sure that each person in charge knows what he is supposed to be doing and does it correctly. This is known as the "directing" function.

The manager is responsible for determining the objectives of the business and the means by which they can be accomplished. this function is called "planning." After the plans are established, he must then decide what responsibilities go with these activities and assign those responsibilities to specific people. This is known as "organizing." After setting up the objectives and assigning the responsibilities, the manager needs to check on the progress being made. "Controlling" is measuring the amount of progress toward the objective or objectives and taking appropriate action if adjustments are necessary.

The marketing manager, then, is responsible for coordinating all of the business resources by planning, organizing, directing, and controlling all of the activities and personnel to meet the goals of the business. Management is the process of coordinating these resources to achieve the goals set for the business or organization.

1. ____________________ determining the objectives of the business and the means by which they wiii be accomplished.

2. When you decide on the responsibilities of the business and assign these responsibilities, you are ____________ the business.

3. ____________________ is the process of measuring the amount of progress toward the objectives and taking any action necessary to speed this progress; it is the supervision of performance.

4. The process of guiding or leading the company personnel so that they understand their responsibilities in reaching the goals of the business is the management function of ____________________

1. What makes a person dependable?

2. How can an employee show his employer that he wishes to improve on his job?

3. How can an employee show his employer that he wants to learn more about the company's business?

4. What are three specific things an employee can do to learn what the steps are up the job ladder to the position of buyer?

Case Study

Smith Hardware is an extremely large retail store in the heart of Ft. Lauderdale. You were fortunate enough to receive an order from them in early September for 750 artificial Christmas trees. 250 of these trees were shipped to Smith in faulty condition. It seemed the holes in the center pole were a smaller size than the artificial limbs. Upon inspection, it was found that all of these faulty trees came from a different manufacturer than the other trees.

What two factors should be considered in solving this problem?

#71

Montgomery Hardware has just returned to your warehouse a dozen camping Lanterns which they purchased with cash two days ago. It seems that one of the store's salesmen was slightly hurt when one of the Lanterns exploded while being demonstrated. Upon inspection by the Adjustments and Returns Department of Starr Wholesalers, Inc., certain factors related to the situation were revealed:

1. The buyer failed to notify the salesman of Starr that these Lanterns were to be used with gasoline only.
2. Caution slips stating that only gasoline was to be used were removed by the Receiving Department of Starr, Inc.
3. The Credit Department of Starr billed Montgomery for the Lanterns even though the Lanterns were paid for with cash.

Explain how to solve the immediate complaint and insure that reoccurence would be eliminated by using the following departments

Buying:

Warehousing:

Selling:

Credit:

MANAGEMENT BASEBALL* #72

Participants

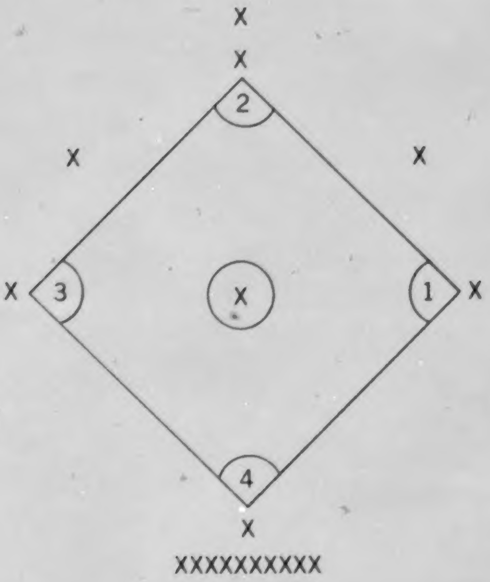
2 Teams (9 players each)

1 Umpire

1 Scorekeeper

2 Managers (1 each team)

– Substitutes



Preparation

Develop four sets of questions ranging in difficulty from 1 (the easiest) to 4 (the most difficult) with a question on one side of a card and its number on the other side. If possible, use four different colors of paper, such as red, blue, orange, and green, to help distinguish the questions and add interest. Arrange the room so that you have an area similar to the diamond drawn above. Place chairs where the X's are shown and a small table with the chair in the center of the diamond. Stack the four sets of questions on the table in order (1, 2, 3, 4) face down so that the numbers show.

Divide the class into two teams and have each team select a manager. Have each team manager assign players to one of the following positions:

Pitcher – serves as the moderator asking questions to each opposing team player who comes up to bat; may decide to "walk" a player to first base.

First Baseman – may answer the first 1 point question (a single) that an opponent up to bat misses and get that player "out".

Second Baseman – same as above – 2 point question (a double).

Third Baseman – same as above – 3 point question (a triple).

Catcher – same as above – 4 point question (a homerun).

Right Fielder – may answer the second 1 point question (a single) that an opponent up at bat fails to answer to make an "out".

Center Fielder -- same as above – 2 point question (a double).

Left Fielder – same as above – 3 point question (a triple).

Short Stop – same as above – 4 point question (a homerun).

Each team manager will decide the "batting order" for his team. Before each player goes up to bat, the manager will discuss strategy for the game, such as going for a double or trying for a homerun.

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Directions

Have the umpire flip a coin with the two managers to see which team will be "up to bat" first. The manager winning the toss will then review batting orders with his team. The other team manager will supervise his players taking their designated positions in the field.

The first player at bat tells the pitcher whether he is trying for a single, double, triple, or homerun, at this point the pitcher may decide to "walk" the batter or he may select a card from the corresponding stack and read the question to the hitter. If the player at bat answers that question correctly, he walks around the bases to the appropriate one.

If the player is incorrect, the opposing baseman (1, 2, 3, or catcher) may answer the question. If he answers the question correctly, the player at bat is "out." If he is not correct, however, the "hitter" only has one strike counted against him.

When a player at bat has an opportunity to answer a second question, he may select a single, double, triple, or homerun without conferring with his team manager. If he is correct in answering the question, he may proceed to that base.

If his second answer is not correct, the appropriate outfielder may attempt to answer the question. That is, the right fielder may answer the "single" point question, etc. A correct answer by the field player earns an "out." An incorrect answer on the second question by the fieldman entitles the player at bat a third and final attempt to answer a question of his choice. If he is correct, he goes to the corresponding base. An incorrect answer gives him a third strike and he is out.

Each team remains "at bat" until it has made three outs. At that time the team in the field comes to bat. When each team has had its chance at bat, one inning will have been completed. A game may be played for three innings, forty-minutes, or any limit established by the instructor.

Scoring

As in the regular game of baseball, the game is won by the team with the largest number of points. For added interest, the scorekeeper may keep track of each team's number of hits. If the game is played for a longer period of time, such as during several units, players may figure their batting average to help enhance their mathematical skills.

WHOLESALE SIMULATION GAME

#73

This simulation game should be played at the conclusion of the semester course. The major purpose of the game is to reinforce and interrelate the concepts which have been developed throughout the term.

Assuming there are 18 pupils in your class, the roles may be distributed as follows:

3 Manufacturers

5 Retailers

1 Wholesaler (Buyer and Manager)

3 Manufacturer's Sales Agents

1 Wholesale Sales and Promotion Manager

1 Truck Operator

1 Rail Traffic Manager

1 Wholesale Receiving Clerk

1 Wholesale Shipping Clerk

1 Wholesale Customer Service Manager

If the class size exceeds 18, you may add multiple roles, or form two teams. When two teams are formed, or when two wholesaling firms are used, the element of competition can be added to the game by using either play money, or by requiring each wholesaler to keep income and expense statements which would include credit transactions.

CHARACTER CARDS: Duplicate individual roles on 5" x 7" index cards to distribute to the class members.

Manufacturer A

Your firm is located In Ohio. The retailers who may be interested in buying your products for resale are located in Florida.

Questions:

1. What type(s) of hardware product(s) do you manufacture?
2. What are the major characteristics and/or advantages of your product(s) as compared to those manufactured by others?
3. What is your major business problem?
4. Whom do you employ to help you solve this problem?

Manufacturer B

Your manufacturing firm is located in Atlanta, Georgia. The retailers who may be interested in buying your products for resale are located in Florida.

Questions:

1. What type(s) of hardware product(s) do you manufacture?
2. What are the major characteristics and/or advantages of your product(s) as compared to those manufactured by others?
3. What is your major business problem?
4. Whom do you employ to help you solve this problem?

Manufacturer C

Your manufacturing firm is located in North Florida. The retailers who may be interested in buying your products for resale are located throughout Florida.

Questions:

1. What type(s) of hardware product(s) do you manufacture?

2. What are the major characteristics and/or advantages of your product(s) as compared to those manufactured by others?
3. What is your major business problem?
4. Whom do you employ to help you solve this problem?

Manufacturer's Sales Agent A

Questions:

1. For whom do you work?
2. What does your company manufacture?
3. What are the major features of your product(s)?
4. To whom should you sell?
5. What are your major responsibilities?

Manufacturer's Sales Agent B

Questions:

1. For whom do you work?
2. What does your company manufacture?
3. What are the major features of your product(s)?
4. To whom should you sell?
5. What are your major responsibilities?

Manufacturer's Sales Agent C

Questions:

1. For whom do you work?
2. What does your company manufacture?
3. What are the major features of your product(s)?
4. To whom should you sell?
5. What are your major responsibilities?

Retailer A

Your retailer hardware store is located in Ft. Myers, Florida.

Questions:

1. What type of hardware products do you sell in your store?
2. From whom do you buy?
3. What help do you need from your supplier to help you do a good job and make a reasonable profit?

Retailer B

Your retailer hardware store is located in St. Petersburg.

Questions:

1. What type of hardware products do you sell in your store?
2. From who do you buy?
3. What help do you need from your supplier to help you do a good job and make a reasonable profit?

Retailer C

Your retail hardware store is located in Jacksonville, Florida.

Questions:

1. What type of hardware products do you sell in your store?
2. From whom do you buy?
3. What help do you need from your supplier to help you do a good job and make a reasonable profit?

Retailer D

Your retail hardware store is located in Panama City, Florida.

Questions:

1. What type of hardware products do you sell in your store?
2. From whom do you buy?
3. What help do you need from your supplier to help you do a good job and make a reasonable profit?

Retailer E

Your retail hardware store is located in Miami, Florida.

Questions:

1. What type of hardware products do you sell in your store?
2. From whom do you buy?
3. What help do you need from your supplier to help you do a good job and make a reasonable profit?

Truck Operator

You own a fleet of trucks which travel throughout Florida. Your headquarters is in Orlando.

Questions:

1. Who are your potential customers?
2. What services and/or advantages do you offer your customers?

Rail Traffic Manager

You are the rail traffic manager of a large railroad company. Your trains travel throughout the United States. Your headquarters is in Frankfort, Kentucky.

Questions:

1. Who are your potential customers?
2. What services and/or advantages do you offer your customers?

Wholesale Receiving Clerk

Questions:

1. For whom do you work?
2. What are your major responsibilities?
3. How are your responsibilities related to the job responsibilities of the other employees in your company?

Wholesale Shipping Clerk

Questions:

1. For whom do you work?
2. What are your major responsibilities to the job responsibilities of the other employees in your company?

Wholesale Customer Service Manager

Questions:

1. For whom do you work?
2. What are your major responsibilities?
3. How are your responsibilities related to the job responsibilities of the Sales and Promotion Manager?
4. What types of customer services should you provide to your customers?

Wholesale Sales and Promotion Manager

Questions:

1. For whom do you work?
2. Who are your customers?
3. What are your major responsibilities?
4. What types of sales and promotion services should you provide to your customers?

Wholesale Buyer and Manager

Questions:

1. Who are your employees?
2. What are the major responsibilities of each of your employees?
3. Outline a flow of work chart with job stations for your employees.
4. What products should you buy? From whom? How much? When?
5. What are your major responsibilities?

To Play The Game

1. A map of the United States is displayed, and the location of each of the players is identified on the map.

2. The character cards are distributed, and each pupil silently reads his card trying to put himself in the position of the character portrayed.

3. Each pupil reads description of his role from his card to the class.

4. The pupils group themselves according to their individual roles with their respective firms or institutions. (I.E., Manufacturers and Manufacturer's Sales Agents; Wholesale employees; retailers; transportation agents)

5. Each group meets for 10-15 minutes to answer the questions on the individual character cards in their group. Questions and/or problems requiring group answers are discussed, and decisions are reached.

6. At this point, allow adequate time (may be several class periods) for each group to complete the tasks required to actually perform their jobs, i.e., manufacturers and sales agents will bring the product(s) they plan to sell to class; identify the features and/or advantages; identify the sales techniques and services they will offer to the wholesaler. The wholesale employees will develop receiving forms and shipping forms, identify warehousing facilities to be used and construct a model of the facilities out of cardboard, identify and plan the customer services to be offered, identify and develop the sales techniques to be used and the promotional materials which will be provided.

The transportation agents will identify and outline the services to be offered; may identify routes; bring in models of truck and/or rail cars to be used. The retailers will identify and outline the information relating to their business needs to give to the wholesalers including problems which the wholesaler must help to solve.

7. The individual roles are then "plugged in" with each student performing the responsibilities of his job as he has identified them and based on the decisions made by his group.

8. Decisions to be made during the course of the game:

   a. What products should the wholesaler buy from the manufacturer? From whom should he buy? Why? In what quantities? When?

   b. What type(s) of transportation should be used between the manufacturer and the wholesaler? Why? Between the wholesaler and the retailer? Why?

   c. What products should the retailers buy from the wholesaler? What price should he pay the wholesaler? What services should he demand?

d. Determine the amount and rate of profit made by the wholesaler.

Discussion Questions Following Game Simulation

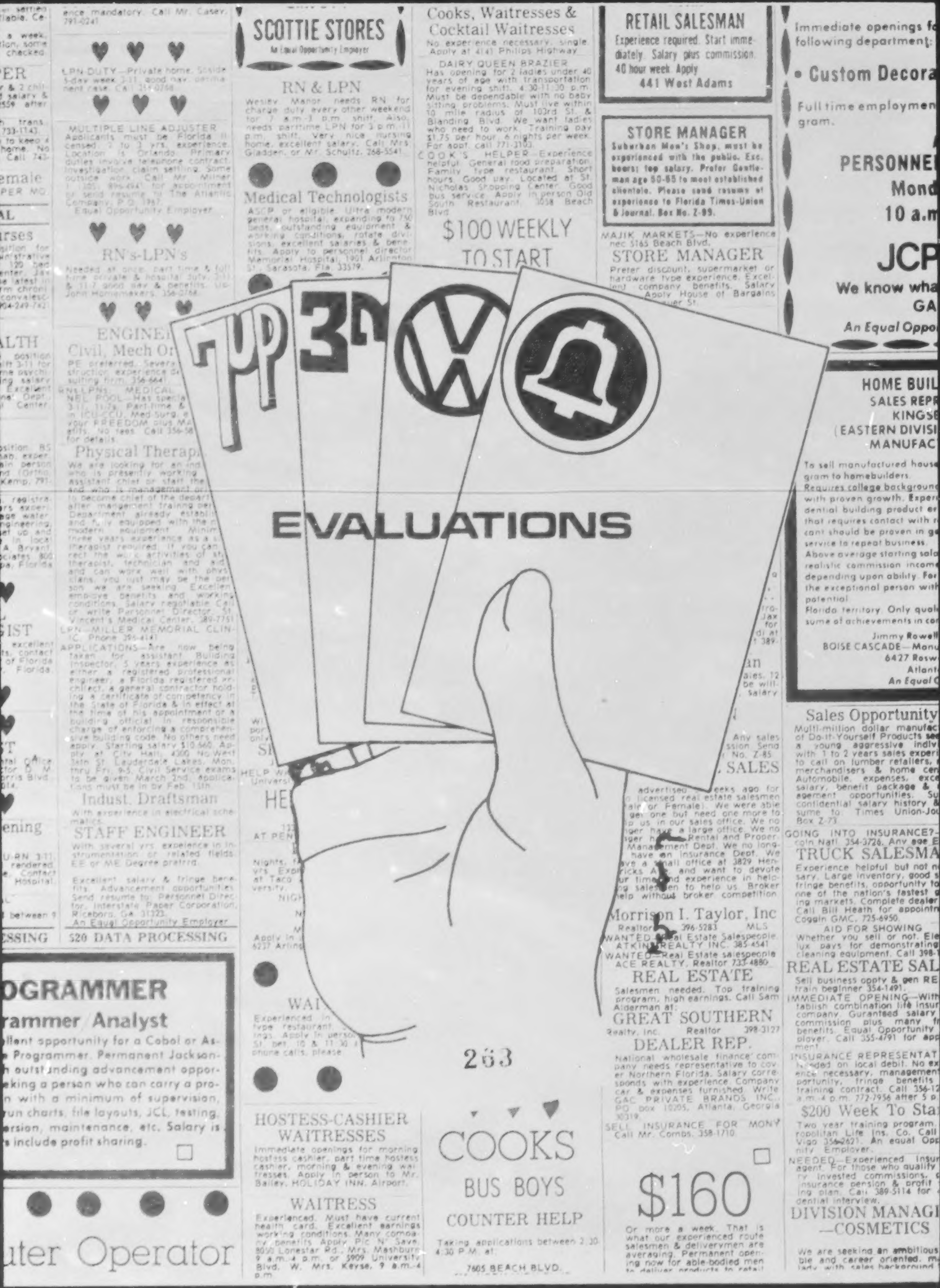
1. On the basis of the products and services offered by the manufacturers and their sales agents, should the wholesaler continue to buy from them in the future? Why? Why not? What improvements could be made?

2. On the basis of the products and services offered by the wholesaler, should the retailers continue to buy from him? Why? Why not?

3. On the basis of the answers and recommendations given in the first two questions, how can the techniques and procedures followed by the Starr Wholesaling Company, Inc. be improved?

4. Final results and recommendations are evaluated by the entire class. The game as a whole is reviewed. The teacher may use some prepared questions to provoke additional discussion.

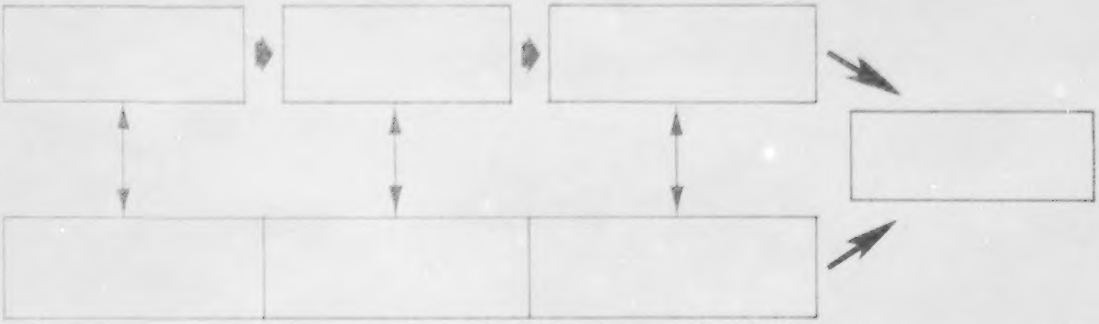
5. Depending on time, the game may be played again with different roles assigned to each student. Upon completion of the game, compare the results with those of the first game.



EVALUATIONS

THE WHOLESALE SCENE

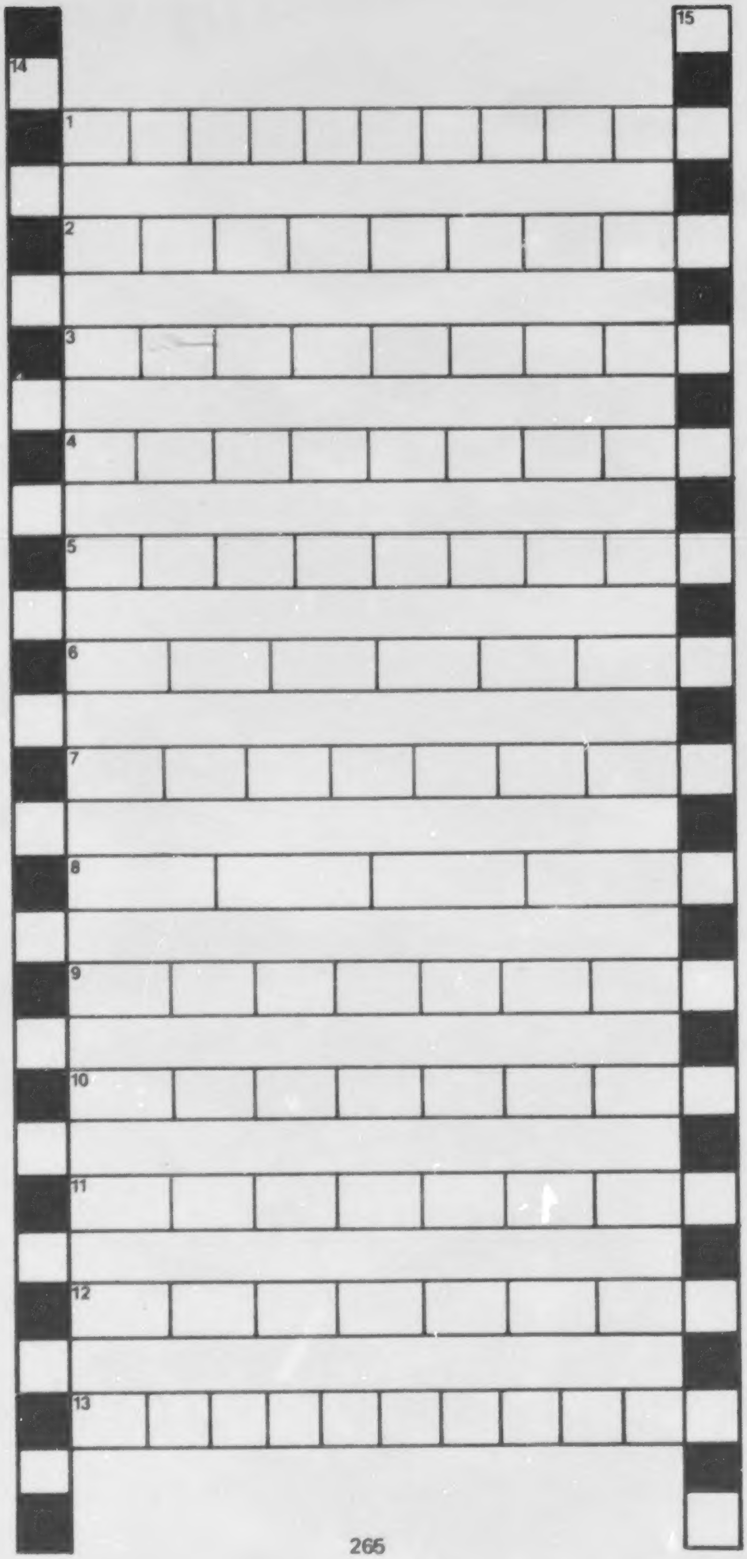
1. Write each of the components in the channels of distribution in the correct order to show the most frequently used channel for goods.



2. Read each of the marketing descriptions below and decide which term is explained. Place that marketing term in the correct blanks of the puzzle on the next page.

---

1. acts as a middleman in distributing goods between the producer and the retailer
2. may be a manufacturer, converter, or an extractor (mining, or agriculture)
3. sells goods directly to the individual consumer; may buy goods directly from the manufacturer or producer, from a wholesaler, or from a special agent
4. one who purchases goods and services for use, not for resale
5. involves the gathering of information so that marketing managers can make sound decisions and solve marketing problems
6. supplies a business with the necessary materials needed for its use or resale to another business or consumers
7. includes all the activities involved in acquiring and distributing goods and services for processing, business use, or personal consumption
8. are possibilities of financial loss to people or property by unforeseen or uncontrollable factors
9. provides the time and space necessary to house merchandise until it is needed for industrial purposes or distribution to consumers
10. deals with funds necessary for business operations and customer purchases
11. the process of assisting or persuading a customer to make a wise buying decision through personal contact or sales promotion materials
12. buy from and sell to manufacturers, wholesalers, and retailers, as well as to consumers
13. serves as a coordinator for all marketing activities
14. provides the service of physically moving property and people from one location to another
15. involves setting values or limits for the goods and services as well as the inspection and labeling to check conformity.



3. Listed below are ten examples of wholesalers and the six major types of wholesale distributors. Decide the category to which each example belongs and place its letter in the blank to the left of the example. Some letters will be used more than once.

A.	MERCHANT WHOLESALER	D.	AGENT OR BROKER
B.	PRODUCER'S OUTLET	E.	PRODUCT ASSEMBLER
C.	PETROLEUM BULK STORAGE	F.	CHAIN WAREHOUSE

________ Housewares Rack Merchandiser
________ Appliance Manufacturer's Agent
________ Regional Gasoline Terminal
________ Tobacco Auction Company
________ Wheat Grain Elevator Company
________ Restaurant Chain Warehouse
________ Vegetables Truck Distributor
________ Parts Manufacturer's Sales Branch
________ Orange Growers Cooperative Association
________ Automobile Wholesale Distributor

4. The person in each of the wholesale situations below is involved in a major marketing activity. Decide what it is and place the name of that function in the blanks provided.

John questioned customers about the delivery service provided.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Fran studied all the past business records in order to develop a plan for the next year's operation of her novelty wholesale company.

☐☐☐☐☐☐☐☐☐☐

Alice checked to see that all of the trucks were operating.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

David prepared the yellow pages advertising copy for his broker's firm.

☐☐☐☐☐☐☐

Brad ordered ten cases of hangers for his housewares wholesale company.

☐☐☐☐☐

Charlotte was taking a chance that the weather wouldn't turn warm before the wool material in her warehouse was sold.

☐☐☐☐

Janice rang up the sale for the customer's radios on the cash register.

☐☐☐☐☐☐☐

Nancy checked the customer's credit records before approving a purchase.

☐☐☐☐☐☐☐

Marvin arranged the new hats on the warehouse shelves.

☐☐☐☐☐☐☐

Paul delivered all of the freezers which had been sold for the week.

☐☐☐☐☐☐☐☐☐☐☐☐☐☐

THE WHOLESALE SURVEY

1. Identify each of the five major components in the most frequently used channel of distribution by drawing a picture of each and labeling each in the blank provided. Be sure they are in the correct order to show the flow of goods and services.

1.__________________ ➡ 2.__________________ ➡ 3.__________________ ↘

5.______________________

4.__________________/__________________/__________________ ↗

2. For each of the descriptions below, identify the correct marketing term and write the term in the appropriate blank.

__________________ 1. acts as a middleman in distributing goods between the producer and the retailer.

__________________ 2. may be a manufacturer, converter, or an extractor (mining or agriculture).

__________________ 3. sells goods directly to the individual consumer, may buy goods directly from the manufacturer or producer, from a wholesaler, or from a special agent.

__________________ 4. one who purchases goods and services for use, not for resale.

__________________ 5. involves the gathering of information so that marketing managers can make sound decisions and solve marketing problems.

__________________ 6. supplies a business with the necessary materials needed for its use or resale to another business or consumers.

__________________ 7. includes all the activities involved in acquiring and distributing goods and services for processing, business use, or personal consumption.

__________________ 8. are possibilities of financial loss to people or property by unforeseen or uncontrollable factors.

__________________ 9. provides the time and space necessary to house merchandise until it is needed for industrial purposes for distribution to consumers.

__________________ 10. deals with funds necessary for business operations and customer purchases.

__________________ 11. the process of assisting or persuading a customer to make a wise buying decision through personal contact or sales promotion materials.

__________________ 12. buy from and sell to manufacturers, wholesalers, and retailers, as well as to consumers.

____________________ 13. serves as a coordinator for all marketing activities.

____________________ 14. provides the service of physically moving property and people from one location to another.

____________________ 15. involves setting values or limits for the goods and services, as well as the inspection and labeling to check conformity.

3. Study each of the examples of wholesale businesses given in the boxes below. Select the type of wholesale business it is from the list underneath the boxes and place its letter in the appropriate box.

___ 1. Rack Merchandiser

___ 2. Retail Warehouse

___ 3. Fuel Oil Terminal

___ 4. Cash and Carry Co.

___ 5. Cooperative Assoc.

___ 6. Grain Elevator Co.

___ 7. Mfg. Sales Branch

___ 8. Auction Company

___ 9. Commission Agent

___ 10. Distributorship

a. Producer's Outlet

b. Product Assembler

c. Merchant Wholesaler

d. Agents or Brokers

e. Chain Warehouse

f. Petroleum Bulk Storage

4. In each of the wholesale situations below, the employee is engaged in a major marketing activity. Can you decide which one? Write the term in the blanks provided.

John questioned customers about the counter sales' new hours.

___ ___ ___ ___ ___ ___ ___ ___ ___ / ___ ___ ___ ___ ___ ___ ___ ___

Alice checked to see that all of the radios were operating.

___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___

Brad ordered ten cases of hammers for his hardware supply company.

___ ___ ___ ___ ___ ___

Janice rang up the sale for the customers' bottles on the cash register.

___ ___ ___ ___ ___ ___ ___

Marvin arranged the new toys on the warehouse shelves.

___ ___ ___ ___ ___ ___ ___

Paul delivered all of the furniture which had been sold for the week.

___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___ ___

Nancy checked the customer's credit records before approving an order.

____ ____ ____ ____ ____ ____ ____

Charlotte was taking a chance that the weather wouldn't turn warm before the stock of portable heaters was sold.

____ ____ ____ ____

David prepared the yellow pages advertising copy for his distributorship.

____ ____ ____ ____ ____ ____ ____

Fran studied all the past business records in order to develop a plan for the next year's operation of her cash and carry beauty aids company.

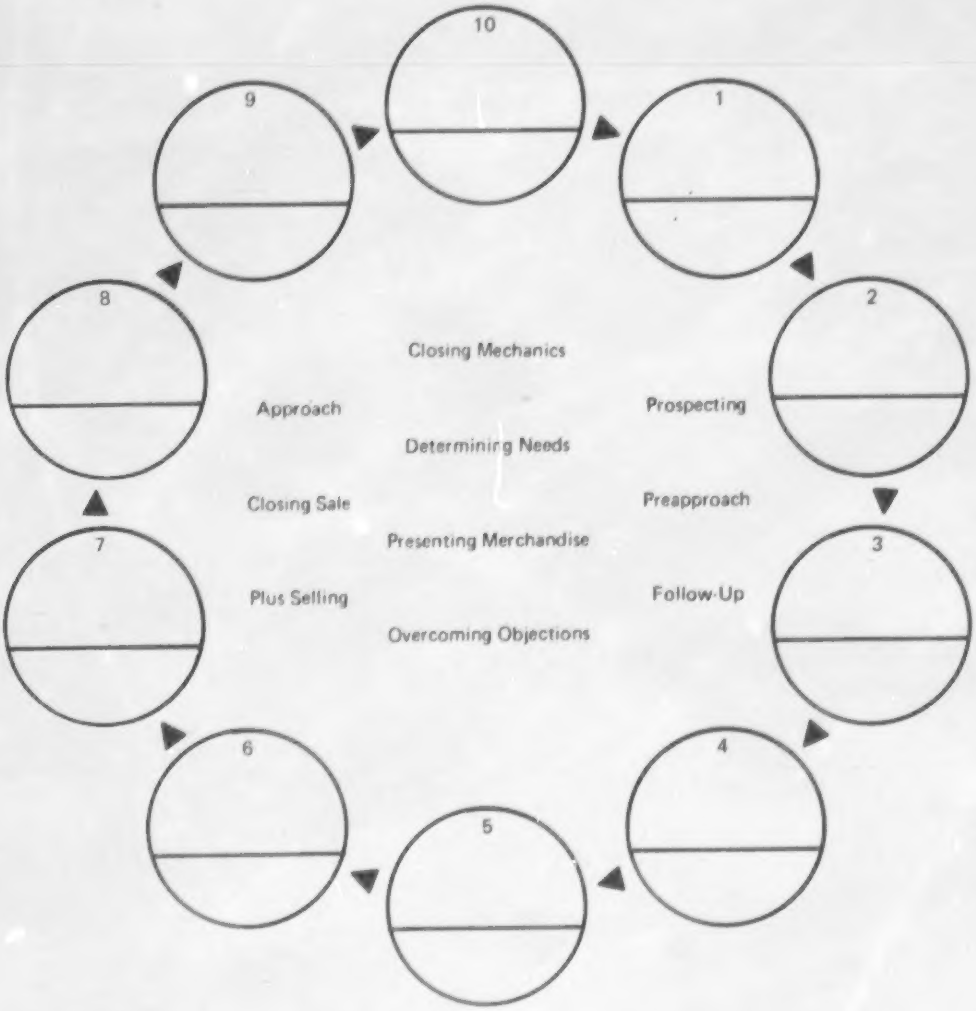
____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____

THE WHOLESALE SELLING SCENE

1. Name four wholesale selling careers for each career level in the spaces below.

JOB ENTRY	*ADVANCED CAREER*	*MANAGEMENT*

2. Identify the ten steps in the order that a salesman should take them in making a sale and satisfying a customer and place them in the numbered circles below beginning with number one.



Closing Mechanics

Approach

Prospecting

Determining Needs

Closing Sale

Preapproach

Presenting Merchandise

Plus Selling

Follow-Up

Overcoming Objections

3. Boyd Supply, Inc. is a medium-sized wholesale distributor of jewelry, tableware, and china that services retailers in the state of Florida. The company has both an inside and outside sales staff of eight different sales careers. The management wants to concentrate on four promotional methods and four customer services. If you were the general manager, which eight selling careers would you have in this company? What four promotional methods and four customer services would you emphasize? Be specific in your answers.

Selling Careers

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________

Promotional Methods

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

Customer Services

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

THE WHOLESALE SELLING SURVEY

1. Name four selling careers in wholesale firms for each career level below.

JOB ENTRY ____________________

ADVANCED ____________________

MANAGEMENT ____________________

2. Study each of the ten steps which a salesman performs in completing a sale and satisfying his customer. Decide the order in which they should take place and write the correct number in the blank provided. Number 1-10.

Presenting Merchandise	____	explaining and showing the product as it would be used.
Overcoming Objections	____	emphasizing the benefits of the product and services of the seller.
Closing Sale	____	bringing the customer to a positive buying decision.
Plus Selling	____	attempting to sell the customer higher quality or additional goods.
Approach	____	greeting the customer and opening the sale.
Determining Needs	____	finding out how, for what, and by whom the product is to be used.
Closing Mechanics	____	completing the sales transaction by writing a purchase order, ringing up a sale, etc.
Follow-Up	____	contacting the customer at a later date to determine his satisfaction and offer additional service.
Prospecting	____	process of seeking and finding possible customers.
Preapproach	____	procedure of obtaining information about your prospect and product.

3. Ace Electric Supply, Inc. is a moderately large wholesale distributor of electric materials and supplies for industrial users in the state of Florida. The company's inside-outside sales staff includes eight different careers. If you were going to select eight positions in selling for the company, which eight would you select. Which four sales promotion methods and four customer services would you provide?

Selling Careers

1. ________________________
2. ________________________
3. ________________________
4. ________________________
5. ________________________
6. ________________________
7. ________________________
8. ________________________

Promotional Methods

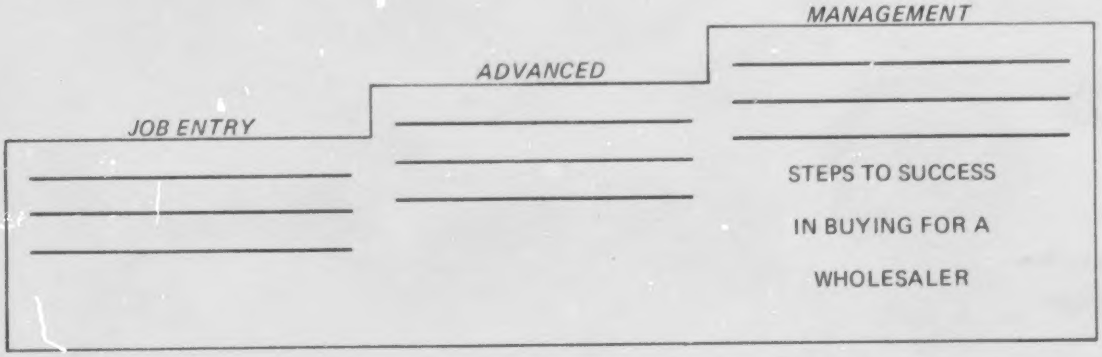
1. ________________________
2. ________________________
3. ________________________
4. ________________________

Customer Services

1. ________________________
2. ________________________
3. ________________________
4. ________________________

THE WHOLESALE BUYING SCENE

1. Place a wholesale buying career under each step so that there are 3 careers for each of the three career levels.



2. Read each wholesale buying activity below and decide which buying career is involved. Write the career title in the spaces underneath the description of the activity.

a. Margo visited showrooms and selected merchandise for three different wholesalers to sell.

__________/ ______

b. Chuck completed order forms to stock the fishing department for the March business trade.

______________/ _____

c. Rachel examined the company's individual store orders and had the necessary amounts sent to each store.

_______________/ ______

d. Phil reviewed his buying plan for cosmetics in relation to the other buyer's plans.

____________/ ______

e. Geraldine studied the results of the customer survey to give a report to the executive board of the wholesale company.

____________/ __________/ _________/

f. Wilson talked to customers as they walked into the counter sales to see how often they shopped there.

__________/ ______________/

g. Troy reported to the merchandise manager that all of the clothing buyers were ready to go to market.

_____/ _______/

h. Frita tried each of the manufacturer's blenders to see which one of them operated most effectively.

_________/ ________/

i. Sean visited other sporting goods display showrooms to see the golf clubs and tennis equipment they were selling.

_____________/ _________/

j. Lillian talked to all the company buyers about the changes that would take place in buying policies.

______________/ _________/

3. Grace must organize and direct activities of all buying staff for the company's chain of warehouses. The group will travel to New York next month to purchase merchandise for next winter in all building supplies and hardware departments. What five buying personnel (not related areas) would be involved? What major buying decisions must be made? What nine resources would be most helpful to the buying staff? Place your answers in the blanks provided below.

CAREERS

____

____

____

____

____

DECISIONS

____

____

RESOURCES

____

____

____

____

____

____

____

____

____

276

THE WHOLESALE BUYING SURVEY

1. Name 3 wholesale buying careers for each of the career levels below and write them in the blanks provided.

Job Entry	Advanced Career	Management
____________	____________	____________
____________	____________	____________
____________	____________	____________

2. Read each wholesale buying activity below and decide which career associated with buying is involved and write the career title on the line at the left of the activity.

____________ a. George met with all his company's buyers to discuss the company's budget for the next year.

____________ b. Belinda visited the other showrooms in town to see what kinds of linens they carried.

____________ c. Judy reviewed the orders of her specialty buyers before giving them to the merchandise manager.

____________ d. Mark called customers on the telephone to see if they knew of the new warehouse location.

____________ e. Grover tasted pieces of cheese from the large cartons that were delivered to his company.

____________ f. Shirley met with the buyers from wholesalers to explain the new market styles and trends.

____________ g. Ronald checked the stock bins and wrote orders for merchandise that was needed.

____________ h. Virginia reported the results of her talks with ten company salesmen to the purchasing manager.

____________ i. Luke gave an overview of the business and market conditions to a meeting of the company's buyers and merchandise manager.

____________ j. Samantha ordered the watches for her company's forty jewelry warehouses in the southeastern United States.

3. Ned knew he had to buy new merchandise sometime next month for the company's outside salesmen to sell. As the boss of the buying staff, he had four people responsible for the four major merchandise divisions. Each of them had one to three people assigned to buy goods in that area of merchandise. Each of them had an employee who worked closely with them in ordering merchandise.

   What five buying career personnel are involved here? What buying decisions must be made? What eleven resources could be used in Ned's situation?

CAREERS

____

____

____

____

____

DECISIONS

____

____

____

____

RESOURCES

____

____

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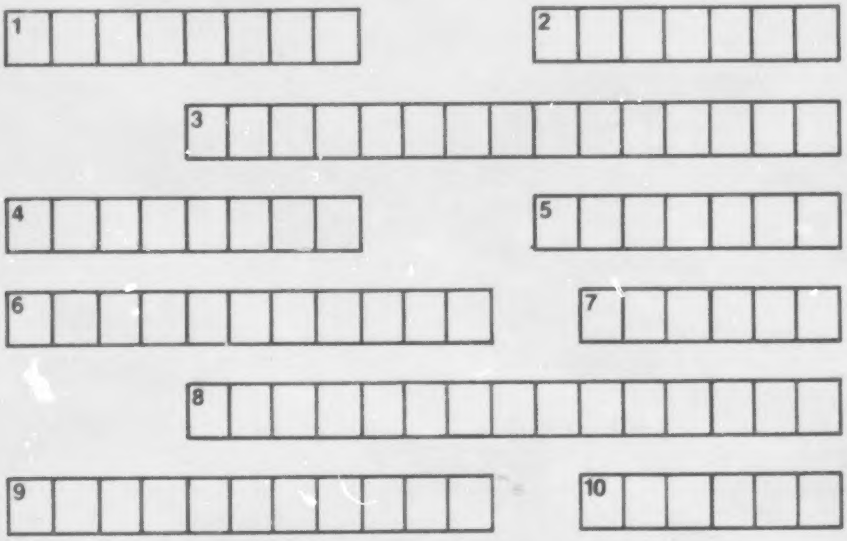
____

THE WAREHOUSING SCENE

1. Read each of the job descriptions below and decide which of the listed career titles is explained. Write that career title in the appropriate numbered blank.



MARKER
CHECKER
ORDER PICKER
STOCKMAN
ROUTE DISPATCHER

PACKER
RECEIVER
SHIPPER
DELIVERYMAN
MATERIALS HANDLER

1. checks all incoming merchandise against the purchase order and packing slip.
2. inspects the incoming or outgoing merchandise for correct sizes, amounts, colors, quality, etc.
3. transports products between the dock, receiving, shipping, and storage areas by hand or with equipment.
4. stores and arranges incoming merchandise, prepares bin tickets, and keeps the stock orderly.
5. checks the customer's order against the packing slip to be certain the correct merchandise is being sent.
6. selects the outgoing merchandise from the shelves, bins, etc., which is to be packed and shipped.
7. prepares merchandise tickets for incoming goods and attaches the tickets to the products; sometimes makes shipping labels.
8. assigns deliverymen the areas in which they will deliver merchandise to customers or commercial shipper.
9. transports the retailer's merchandise from the business to the customer or a commercial carrier.
10. assembles merchandise to be shipped, selects an appropriate container, wraps and arranges the goods in the box, seals the box.

2. Read each of the shipping-receiving situations below. Decide which careers and forms are involved. Place the names in the spaces provided on the following page.

   a. Phyllis recorded the dates, quantities, details, and condition of the incoming boxes of merchandise on the form.

   b. Rex placed the spoiled chocolates in the return carton and completed a sheet with the needed information to send the chocolates back to the supplier.

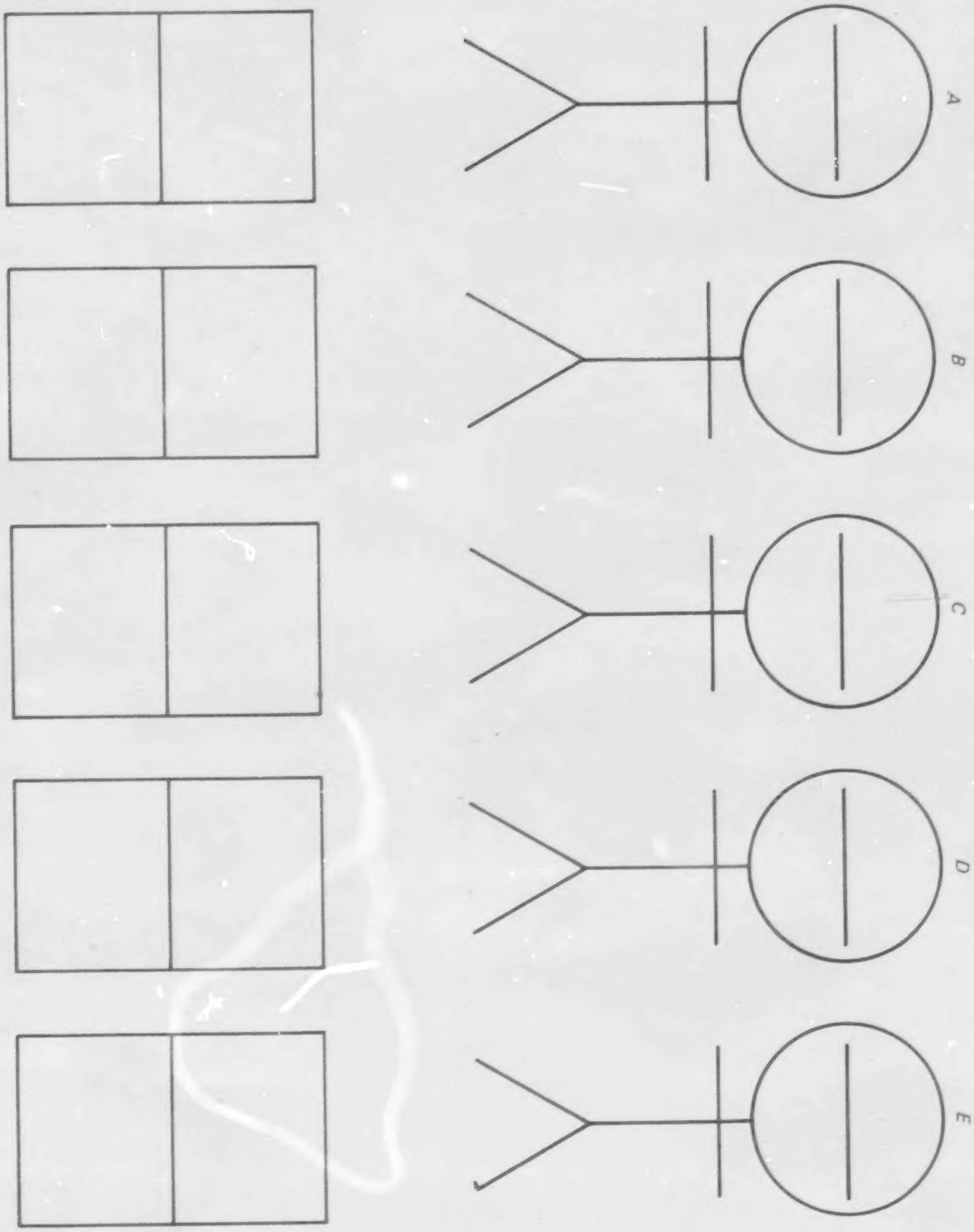
   c. Jack moistened the slips of paper and stuck them on each box of golf balls.

   d. Larry marked ten radios off the sheet in the stock bin and delivered them to the appliance department.

   e. Jennifer filled in the information on the customer's bill for the merchandise being mailed.

FORMS

CAREERS



THE WAREHOUSE SCENE

3. Jason Jewelry, Inc., is a large wholesale distributor of costume jewelry, as well as expensive better jewelry. Mr. Jason wants to design a new warehouse which will provide separate areas for all warehousing activities and staff the warehouse with the necessary warehouse personnel. He only wants one supervisory staff person in the warehouse.

Design a suitable warehouse showing nine necessary areas and label the type of warehouse needed on the line beneath the drawing. Select ten warehouse career personnel to meet Jason's needs and write their titles in the blanks provided.

(Type of Warehouse)

WAREHOUSE CAREERS

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

THE WAREHOUSING SURVEY

1. Read each of the job descriptions below and decide which shipping and receiving career is identified. Select the correct title from the given list and place its corresponding letter in the blank to the left of the description.

a. Marker
b. Shipper
c. Receiver
d. Materials Handler
e. Merchandise Distributor
f. Tracer
g. Checker
h. Stockman
i. Order Dispatcher
j. Inventory Control Clerk

__________ 1. checks all incoming merchandise against the purchase order and packing slip.

__________ 2. transports products between the dock, receiving, shipping, and storage areas by hand or with equipment.

__________ 3. inspects the incoming or outgoing merchandise for correct sizes, amounts, colors, quality, etc.

__________ 4. prepares merchandise tickets for incoming goods and attaches the tickets to the products; sometimes makes shipping labels.

__________ 5. stores and arranges incoming merchandise, prepares bin tickets, and keeps the stock orderly.

__________ 6. checks merchandise in stockroom to determine amounts on hand, slow- and fast-moving items, shortages, etc.

__________ 7. serves as a liaison between the buying and shipping/receiving departments of branch or chain retailers by allocating goods to the various stores.

__________ 8. receives incoming orders by mail or telephone from customers desiring certain merchandise.

__________ 9. checks the customer's order against the packing slip to be certain the correct merchandise is being sent.

__________ 10. communicates with customer, deliverymen, and commercial carriers regarding lost or damaged merchandise.

2. Read each of the shipping-receiving situations below. Decide which careers and forms are involved. Place the names in the spaces provided.

   a. Mickey accepted the form from the truck driver delivering the ordered merchandise. Mickey counted the number of boxes, reviewed the shipping charges, and signed the form. What is Mickey's career title? What form did he sign?

   b. Jackie opened the box of goods which had been received, removed a piece of paper describing the contents, and compared the contents to the paper information for differences. What job does Jackie have? What piece of paper did he remove from the box?

c. Ralph printed slips of cardboard with merchandise information including the price, size, style number, and date received. These would be attached to the goods. What is Ralph's occupation? What slips did he print?

d. Chester selected the merchandise from the stockroom shelves that was requested by a department manager on the form. What is Chester's job title? What form did he receive?

e. Glenn prepared a report including the date sent, quantities, characteristics, method of transfer, and the carrier for the good being sent to their catalog customer.

	CAREER TITLE	*FORM INVOLVED*
a.		
b.		
c.		
d.		
e.		

THE WAREHOUSE SURVEY

3. Better Building Supplies, Inc., is a large wholesaler that needs a new warehouse. Mr. Fleming wants to design a new warehouse which will provide separate areas for all warehousing activities and staff the warehouse with the necessary warehouse personnel. He only wants one supervisory staff person in the warehouse.

   Design a suitable warehouse showing nine necessary areas and label the type of warehouse needed on the line beneath the drawing. Select ten warehouse career personnel to meet Better Business Supplies, Inc.'s needs and write their titles in the blanks provided.

____
(Type of Warehouse)

WAREHOUSE CAREERS

1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________
7. ____________________
8. ____________________
9. ____________________
10. ____________________

THE WHOLESALE FINANCE SCENE

1. Read each of the job descriptions in the right column and decide which career title in the left column is explained. Draw a line from the career title in the left column to its job description in the right column.

_____ Accounting Manager

_____ Accounts Payable Clerk

_____ Credit Authorizer

_____ Comptroller

_____ Credit Clerk

_____ Credit Collector

_____ Credit Investigator

_____ Credit Manager

_____ Inventory Control Clerk

_____ Accounts Receivable Clerk

_____ Merchandise Control Manager

A. contacts delinquent accounts to obtain money owed to the business.

B. checks past history and current status of business applicant's character, capacity, and capital.

C. supervises all credit and collections employees and activities for the firm.

D. keeps records of merchandise by size, style, color, price, etc.

E. calculates dates, discounts, and payments for customer accounts.

F. supervises inventory control activities for the wholesaler.

G. establishes and maintains accounting systems for the business.

H. figures payments and dates due on goods bought by the business.

I. approves or disapproves credit customers, limits, and extensions.

J. directs all financial activities, reports, and personnel of the business.

K. payments on accounts, handles various credit activities.

2. Read each credit and control activity and decide which career is involved. Write that career title in the boxes provided (one for each letter).

a. Marsha called the credit bureau to check on an applicant's credit status.

☐☐☐☐☐☐☐☐☐☐☐☐

b. Sam interviewed an applicant for a position in his credit department.

☐☐☐☐☐☐ ☐☐☐☐☐☐☐

c. Donna crossed out items in her book that had been sold.

☐☐☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐ ☐☐☐☐☐

d. Clarence decided which items needed to be reordered.

☐☐☐☐☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐

e. Terry placed the money in the cash drawer trays to start the day.

☐☐☐☐ ☐☐☐☐☐☐☐ ☐☐☐☐☐

f. Barbara explained the company's financial position to the board.

☐☐☐☐☐☐☐☐☐☐☐

g. Terry approved additional purchases on a charge account.

☐☐☐☐☐☐☐☐☐☐

h. Greg handed the customer a credit application.

☐☐☐☐☐☐ ☐☐☐☐☐

i. Neal asked the customer for payment on his account.

☐☐☐☐☐☐☐☐☐

j. Ollie questioned the applicant about his present employer.

☐☐☐☐☐☐☐☐☐☐☐

3. Using the information provided on the following credit application form, check the appropriate box concerning the acceptance or denial of credit and give reasons for acceptance or denial. Identify four credit careers that would be involved.

Date Dec. 31, 1974

Name of Firm

Address 1029 E Darby (street) Sulphur (city) Okla. (state) 33301 (zip)

Phone 631-8724

Previous Year Dollar Sales	$ 70,000
Previous Year Liabilities	115,000
Previous Year Capital	5,000
Current Year Dollar Sales	89,000
Current Year Liabilities	90,000
Current Year Capital	4,500
Dollar Value of Tangible Assets	$ 45,000

Often delinquent in paying other wholesalers and manufacturers but always pays within 6 months.

Credit Acceptance ☐

Credit Denial ☐

Reasons for Acceptance or Denial:

Character ☐

Capacity ☐

Capital ☐

CREDIT CAREERS INVOLVED

1. ______
2. ______
3. ______
4. ______

Suggested Time: 20 minutes

THE WHOLESALE FINANCE SURVEY

1. Read each of the job descriptions about credit and control personnel below. Decide which career title from the given list is explained and write that title in the blank to the left of its job description.

Accounting Manager
Charge Authorizer
Comptroller
Credit Clerk
Credit Collector
Accounts Receivable Clerk
Credit Investigator
Credit Manager
Inventory Control Clerk
Merchandise Control Manager

______________ a. directs all financial activities, reports, and personnel of the business.

______________ b. approves or disapproves credit customers, limits, and extensions.

______________ c. payments on accounts, handles various credit activities.

______________ d. contacts delinquent accounts to obtain money owed to the business.

______________ e. calculates dates, discounts, and payments for customer accounts.

______________ f. checks past history and current status of business applicant's character, capacity, and capital.

______________ g. supervises all credit and collections employees and activities for the firm.

______________ h. keeps records of merchandise by size, style, color, price, etc.

______________ i. supervises inventory control activities for the wholesaler.

______________ j. establishes and maintains accounting systems for the business.

2. Study each of the credit and control activities described below. Decide which career is involved and write its title in the spaces provided.

______________ a. Mark greeted the customer and gave her a credit application.

______________ b. Ted knocked on the customer's door to see him about payment on his account.

______________ c. Frank figured the dates, discounts, and payments of the customer accounts.

______________ d. Steve called two stores to determine the applicant's credit status.

______________ e. Rene' called a meeting of all credit employees to explain new policies.

______________ f. Jim recorded the sizes, styles, and colors of the new clothes.

______________ g. Priscilla recorded the Merchandise numbers of the items to be marked down.

______________ h. Van prepared the annual budget for the next board meeting.

______________ i. Wanda met with all department heads to explain the company's financial position.

______________ j. Roger approved the new credit application for a $300 credit limit.

3. Using the information provided on the following credit application form, check the appropriate box concerning the acceptance or denial. Identify four credit careers that would be involved.

Date Dec. 31, 1974

Name of Firm Montgomery Hardware

Address	1029 E Darby	Sulphur	Okla.	33301
	street	city	state	zip

Phone 631-8724

Previous Year Dollar Sales	$80,000
Previous Year Liabilities	95,000
Previous Year Capital	2,000
Current Year Dollar Sales	78,000
Current Year Liabilities	70,000
Current Year Capital	2,500
Dollar Value of Tangible Assets	$35,000

Credit Acceptance ☐

Credit Denial ☐

CREDIT CAREERS INVOLVED

1.
2.
3.
4.

Reasons for Acceptance or Denial:

Character ☐
Capacity ☐
Capital ☐

THE WHOLESALE MANAGEMENT SCENE

1. Decide which 12 wholesaling careers below are at the management/specialist level and place an "X" in the blanks to the left of the career titles.

____ Warehouse Manager

____ Auctioneer

____ Sales Engineer

____ Credit Investigator

____ Vice-President, Sales

____ Display Man

____ Head Buyer

____ Materials Handler

____ Credit Manager

____ Advertising Man

____ Inventory Control Clerk

____ Operations Manager

____ Counterman

____ Purchasing Manager

____ Sales Manager

____ Sales-Service Supervisor

____ Order Dispatcher

____ Comptroller

____ Ad Illustrator

____ Marketing Research Analyst

2. Read each of the wholesale management career descriptions below and decide what career title is explained. Place that title in the correct spaces on the puzzle form. Determine which management level is described and place the appropriate letter "M," "S," or "E" in the blank to the left of the description. "M" represents mid-management/supervisor, "S" represents specialist, and "E" represents executive.

____ a. Provides information about business trends and market conditions.

____ b. Coordinates all buying and selling activities for the wholesaler.

____ c. Supervises all promotional campaigns for a wholesale distributor.

____ d. Top executive in a large wholesale corporation.

____ e. Supervises all inside selling activities and personnel.

____ f. Supervises all personnel and activities in the warehouse.

____ g. Provides technical assistance and skill to customer about merchandise.

____ h. Trains and supervises all salesmen, inside and outside.

____ i. Directs and supervises all wholesale financial activities.

____ j. Coordinates all buying activities and personnel for the wholesaler.

3. Read each of the wholesale management decision-making situations below and decide which management function is involved in each case. Write that function in the blanks under each of the situations.

   a. Bess tried to decide the best course of action to take in developing the image of her novelties wholesale supply company.

      — — — — — — — —

   b. Chuck studied all of the alternatives in deciding how to best conduct the planned sales campaign for his jewelry wholesale business.

      — — — — — — — — — —

   c. Mitch conducted a seminar with his sales staff to advise them on company goals, plans, and activities for the new line of lighting fixtures they would be selling.

      — — — — — — — — —

   d. Sarah called the counterman into her office to discuss improvement in his work before deciding whether to discharge him from the company.

      — — — — — — — — — — —

THE WHOLESALE MANAGEMENT SURVEY

1. Study the list of wholesale careers below and circle those twelve which are at the management/specialist level.

OPERATIONS MANAGER
MERCHANDISE DISTRIBUTOR
SALES MANAGER
CREDIT INVESTIGATOR
MATERIALS HANDLER
AUCTIONEER
SALES PROMOTION DIRECTOR
ORDER DISPATCHER
COMPTROLLER
SPECIALTY BUYER

DISPLAY ASSEMBLER
RESIDENT BUYER
GENERAL MANAGER
CASHIER
ADVERTISING MAN
SALES-SERVICE SUPERVISOR
ROUTE SUPERVISOR
INVENTORY CONTROL CLERK
MERCHANDISE MANAGER
MARKETING RESEARCH ANALYST

2. Read each of the wholesale management job descriptions below. Decide which career title is explained and write it in the blanks provided. Show its management level on the blank line provided.

a. I direct all activities within a wholesale business
_ _ _ _ _ _ _ _ _ _/ _ _ _ _ _ _ _ _ _ ______________

b. I develop advertising campaign programs for the wholesaler.
_ _ _ _ _ _ _ _ _ _ _ _ _ _/ _ _ _. ______________

c. I purchase everything in one area of merchandise for a wholesaler.
_ _ _ _ _ _ _ _ _ _ _ _/ _ _ _ _ _ _ ______________

d. I control all financial activities for the business.
_ _ _ _ _ _ _ _ _ _ _ ______________

e. I provide information about market conditions and business trends.
_ _ _ _ _ _ _ _ _ _ _ _/ _ _ _ _ _ _ _ _ _ _/_ _ _ _ _ _ _ _ _ ________

f. I supervise all inside selling activities and personnel.
_ _ _ _ _ _/ _ _ _ _ _ _ _ _ _ _/_ _ _ _ _ _ _ _ _ _ _ _ ________

g. I am the "number one" executive in a large wholesale corporation.
_ _ _ _ _ _ _ _ _ _/ _ _ _ _ _ _ _ _ _ _ _ _ ______________

h. I develop goodwill and publicity for a wholesale distributor.
_ _ _ _ _ _ _/_ _ _ _ _ _ _ _ _ _ _ _/ _ _ _ ______________

i. I supervise all credit accounts and activities for a wholesaler.

_ _ _ _ _ _ _/ _ _ _ _ _ _ _ _ _ ____________________

j. I direct all buying and selling activities for a wholesale company.

_ _ _ _ _ _ _ _ _ _ _ _ _/ _ _ _ _ _ _ _ _ ____________________

3. Study each wholesale management decision and decide which management function is involved in each case. Write that function in the blank to the left of each situation.

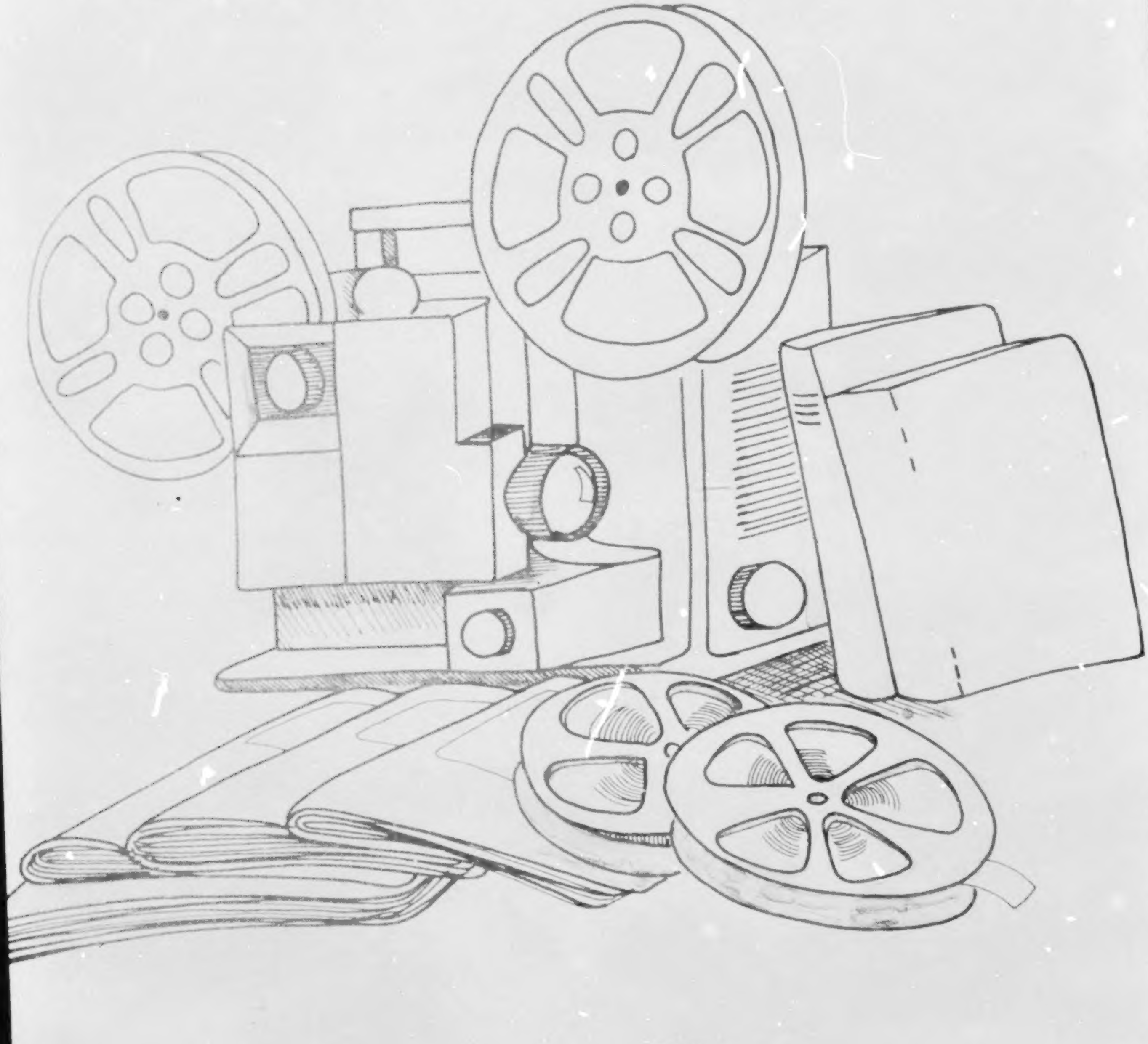
____________ a. Mark tried to determine what was the best image to develop for his new housewares supply company.

____________ b. Gail studied the situation to decide how to best achieve the sales goal she had set for the counter sales area.

____________ c. Paul conducted a meeting with his salesmen to inform them on company goals and sales strategy for the new line of "dune buggies."

____________ d. Tricia fired the counterman because he constantly ignored customers when they entered the department.

SPECIAL RESOURCES



AUDIO-VISUAL RESOURCES

"A Better Way," 16mm black and white film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"Ad-Ventures," 16mm color film, ASSOCIATED BUSINESS PUBLICATIONS, 205 East 42nd Street, New York, New York 10003.

"Art Careers in Advertising," filmstrip, EDUCATIONAL DIMENSIONS CORPORATION, P. O. Box 488, Great Neck, New York 11022.

"Business of Keeping Promises," color sound filmstrip, AUDIO-VISUAL ASSOCIATES.

"Canned Meat Story," 16mm color film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"Career Calling," 16mm color film, JIM HANDY CORPORATION, 2821 East Grand Boulevard, Detroit, Michigan.

"Career Development," cassette tape series, IMPERIAL FILMS, INC., 332 South Michigan Avenue, Chicago, Illinois 60604.

"Career Exploration," color sound filmstrip series, SCIENCE RESEARCH ASSOCIATES, 259 East Erie Street, Chicago, Illinois 60611.

"Career Game," color sound filmstrip, career cards kit, IMPERIAL FILMS, INC., 332 South Michigan Avenue, Chicago, Illinois 60604.

"Careers in Business Administration," color sound filmstrip, PATHESCOPE EDUCATIONAL FILMS, INC., 71 Weyman Avenue, New Rochelle, New York 10802.

"Careers in Fashion and Textiles," color sound filmstrip, PATHESCOPE EDUCATIONAL FILMS, INC., 71 Weyman Avenue, New Rochelle, New York 10802.

"Careers in Food Merchandising," 35mm slide series, FAIRCHILD VISUALS, Dept. O.K., 7 East Twelfth Street, New York, New York 10003.

"Careers in Home Furnishings," 35mm slide series, FAIRCHILD VISUALS, Dept. O.K., 7 East Twelfth Street, New York, New York 10003.

Careers in Illustration," filmstrip, EDUCATIONAL DIMENSIONS CORPORATION, P. O. Box 488, Great Neck, New York 11022.

"Careers in Journalism," color sound filmstrip, PATHESCOPE EDUCATIONAL FILMS, INC., 71 Weyman Avenue, New Rochelle, New York 10802.

"Careers in Sales," 16mm color film, UNIVERSITY OF SOUTH CAROLINA, Division Educational Services, Columbia, South Carolina 29208.

"Careers – Sales," 16mm color film, FLORIDA STATE UNIVERSITY, Tallahassee, Florida.

"Careers Unlimited," cassette tape series, CLASSROOM PRODUCTIONS, 851 College Parkway at McGregor Blvd., Ft. Myers, Florida 33901.

"Credit," 16mm color film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"Discovery," color sound filmstrip series, SCHOLASTIC BOOK SERVICES, Richmond Hill, Ontario, Canada.

"Fashion: The Career of Challenge," 16mm color film, BASSIT INSTITUTE.

"Fruits of a Lifetime," 16mm color film, UNION PACIFIC RAILROAD, 1416 Dodge Street, Omaha, Nebraska.

"Is a Career in Banking for You?" 16mm color film, A.I.M.S. INSTRUCTIONAL MEDIA SERVICES, INC., P. O. Box 1010, Hollywood, California 90028.

"Is a Career in Business Administration for You?" 16mm color film, A.I.M.S. INSTRUCTIONAL MEDIA SERVICES, INC., P. O. Box 1010, Hollywood, California 90028.

"Is a Career In Management for You?" 16mm color film, A.I.M.S. INSTRUCTIONAL MEDIA SERVICES, INC., P. O. Box 1010, Hollywood, California 90028.

"Is a Career in the Apparel Industry For You?" 16mm color film, A.I.M.S. INSTRUCTIONAL MEDIA SERVICES, INC., P. O. Box 1010, Hollywood, California 90028.

"Is a Sales Career For You?" 16mm color film, A.I.M.S. INSTRUCTIONAL MEDIA SERVICES, INC., P. O. Box 1010, Hollywood, California 90028.

"Job Opoortunities Now, Set I" filmstrip series, SINGER, S.V.E. INC., 1345 Diversey Parkway, Chicago, Illinois 60614.

"Opportunities in Sales and Merchandising," 16mm color film, UNIVERSITY OF COLORADO, Fort Collins, Colorado 80521.

"Selling As A Career," color sound filmstrip, UNIVERSAL EDUCATION AND VISUAL ARTS, 221 Park Avenue, South, New York, New York 10003.

"The Journalists," 16mm color film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"Tell It Like It Is" 16mm color film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"The Voice of Your Business," 16mm color film, BELL SYSTEM, Local Telephone Company, Your City, Your State.

"The World of Marketing & Distribution," 35mm slide series, CAREER WORLD, INC., 1560 Vesta Drive, Harrisburg, Pennsylvania 17117.

"The World Is Yours," 16mm color film, MODERN TALKING PICTURES FILM SERVICE, New Hyde Park, New York 11040.

"Understanding Wholesaling," 35mm slides, OHIO DISTRIBUTIVE EDUCATION MATERIALS LAB, The Ohio State University, 1885 Neil Avenue, 115 Townshend Hall, Columbus, Ohio 43210.

"What Do You Want?" 16mm color film, ASSOCIATION-STERLING FILMS, 866 Third Avenue, New York, New York 10022.

"Where Do I Go From Here?" 16mm color film, NATIONAL RESTAURANT ASSOCIATION, 1530 North Lake Shore Drive, Chicago, Illinois 60610.

"Why Work At All?" filmstrip, GUIDANCE ASSOCIATES, Pleasantville, New York 10570.

"Writing Careers in Advertising," filmstrip, EDUCATIONAL DIMENSIONS CORPORATION, P. O. Box 588, Great Neck, New York 11022.

CLASSROOM PRODUCTIONS

Careers Unlimited Cassette Tapes

Unit Number	*Tape Number*	*Career Title*
1 (601)	601 – 1	Broadcasting
1 (601)	601 – 3	
1 (601)	601 – 4	
1 (601)	601 – 5	Advertising
3 (603)	603 – 2	Transportation
4 (604)	604 – 5	Selling
5 (605)	605 – 2	Clothing Fashion
5 (605)	605 – 4	

IMPERIAL FILMS COMPANY*

Career Development Cassette Tapes

Accountant Executive
Actor
Banker
Business Consultant
Buyer
Commercial Artist
Cost Analyst
Driver or Routeman
Editor
Fashion Model
Reporter
Salesman

---

*IMPERIAL FILMS COMPANY, INC.
332 South Michigan Avenue
Chicago Illinois 60604

JASPER EWING AND SONS*

AMERICAN OCCUPATIONS

Cassette/Reel Tape Series

Occupational Title	*Number*	*Occupational Title*	*Number*
ADVERTISING WORKERS	4502	SHIPPING/RECEIVING CLERK	4548
MARKETING RESEARCH WORKERS	4503	AUTO PARTS COUNTER MAN	4550
PUBLIC RELATIONS WORKERS	4504	AUTO SALESMAN	4551
INTERIOR DECORATOR	4529	AUTO SERVICE ADVISOR	4551
ECONOMISTS	4530	RETAIL TRADE SALESWORKER	4553
TECHNICAL WRITERS	4536	TRUCKDRIVER	4569
MODELS	4540	ROUTEMEN	4570
MANAGERIAL OCCUPATIONS	4544	APPLIANCE SERVICEMEN	4574
CASHIERS	4547	PETROLEUM OCCUPATIONS	4586

IMPERIAL INTERVIEW TAPES

Cassette Tape Series

Occupational Title	*Number*	*Occupational Title*	*Number*
ADVERTISING	VG701	TECHNICAL WRITER	VG733
PUBLIC RELATIONS WORKER	VG726	LOCAL TRUCK DRIVER	VG737
COMMERCIAL ARTIST	VG728	GROCERY STORE CLERK	VG739
RETAIL SALESWOMAN	VG729	LAUNDRY ROUTEMAN	VG748

*JASPER EWING AND SONS
610 North State Street
Jackson, Mississippi 39205

JASPER EWING AND SONS*

AMERICAN OCCUPATIONS

Cassette/Reel Tape Series

Occupational Title	*Number*	*Occupational Title*	*Number*
ADVERTISING WORKERS	4502	SHIPPING – RECEIVING CLERK	4548
MARKETING RESEARCH WORKERS	4503	AUTO PARTS COUNTER MAN	4550
PUBLIC RELATIONS WORKERS	4504	MANUFACTURER'S SALESMAN	4552
COMMERCIAL ARTISTS	4528	WHOLESALE TRADE WORKERS	4554
ECONOMISTS	4530	LOCAL TRUCKDRIVER	4569
MANAGERIAL OCCUPATIONS	4544	ROUTEMAN	4570
INDUSTRIAL TRAFFIC MANAGER/ PURCHASING AGENT	4545	PETROLEUM OCCUPATIONS	4586
CASHIERS	4547		

IMPERIAL INTERVIEW TAPES

Cassette Tape Series

Occupational Title	*Number*	*Occupational Title*	*Number*
ADVERTISING	VG701	TECHNICAL WRITER	VG733
ASSEMBLER	VG703	LOCAL TRUCK DRIVER	VG737
PUBLIC RELATIONS WORKER	VG726	LAUNDRY ROUTEMAN	VG748

*JASPER EWING AND SONS
610 North State Street
Jackson, Mississippi 39205

RICHARDS ROSEN PRESS, INC.*

Careers in Depth Series

YOUR FUTURE IN ADVERTISING
Jules B. Singer

YOUR FUTURE IN YOUR OWN BUSINESS
Elmer Winter

YOUR FUTURE IN THE CREDIT FIELD
M. R. Neifield, Ph.D.

YOUR FUTURE IN DIRECT SELLING
Foster E. Goodrich

YOUR FUTURE IN JOURNALISM
Arville Schaleben

YOUR FUTURE IN MARKETING
Norman B. Orent

YOUR FUTURE IN PUBLIC RELATIONS
Edward L. Bernays

YOUR FUTURE IN TRAFFIC MANAGEMENT
Robert Heine

*RICHARD ROSEN PRESS, INC.
29 E. 21st Street
New York, New York 10010

RESOURCE PUBLICATIONS

Advertising: A Career of Action And Variety, pamphlet, AMERICAN ASSOCIATION OF ADVERTISING AGENCIES, 200 Park Avenue, New York, New York 10017

Advertising in the Market Place, by John Burke; Gregg/McGraw-Hill.

Agent and Representative, periodical, 626 N. Garfield Avenue, Alhambra, California.

A Business of Your Own, booklet, SOHIO OIL COMPANY, INC., Cleveland, Ohio.

Career Information: Marketing and Distributive Occupations, AMERICAN VOCATIONAL ASSOCIATION, 115 16th Street N. W., Washington, D.C.

Career Information Units, by James E. Frazier, Ohio State Materials Lab.

Career Opportunities: Marketing, Business & Office Specialists, by Wiggs; J. G. FERGUSON PUBLISHING COMPANY, 6 North Michigan Avenue, Chicago, Illinois 60602.

Career Opportunities in Service, booklet, FORD MOTOR COMPANY, Service Training Programs Department, Garrison Plaza East, 19855 Outer Drive, Dearborn, Michigan 48124.

Career Opportunities in Wholesaling, pamphlet, NAWD

Career World magazine, 501 Lake Forest Avenue, High Wood, Illinois 60040.

Career Briefs, CAREERS PUBLICATIONS, INC.*

Careers In Business, Rochester Institute of Technology, Public Relations Department, One Lomb Memorial Drive, Rochester, New York 14623.

Concise Handbook of Occupations, 1971, Joan M. Costello and Rita Parsont Wolfson, J. G. FERGUSON PUBLISHING COMPANY, 6 North Michigan Avenue, Chicago, Illinois 60602.

Consider a Career In Public Relations, CHRONICLE GUIDANCE PUBLICATIONS, INC.*

DE Film Catalog, by Mollie McKnight; Ohio State Materials Lab

Dictionary of Marketing Terms, by Richard Everhardt; Ohio State Materials Lab.

Dictionary of Occupational Titles, Vol. I, II, III: CHRONICLE GUIDANCE PUBLICATIONS, INC.*

Discovery: Career Log, SCHOLASTIC BOOK SERVICE, Richmond Hill, Ontario.

Distribution and Distributive Careers, FAIRCHILD PUBLICATIONS: 7 East Twelfth Street, New York, New York 10003.

Drug Trade News, periodical, 155 E. 44th Street, New York, New York 10017.

Electrical Merchandising, McGraw-Hill Company, periodical, 330 West 42nd Street, New York, New York.

Electrical Wholesaling, periodical, McGraw-Hill Company, 330 West 42nd Street, New York, New York.

The Encyclopedia of Careers & Vocational Guidance, by Hopke: J. G. FERGUSON PUBLISHING COMPANY, 6 North Michigan Avenue, Chicago, Illinois 60602.

Finding Your Job booklets, FINNEY COMPANY*

Going Places in Oil, booklet, AMERICAN PETROLEUM INSTITUTE, 1271 Avenue of the Americas, New York, New York 10020.

Handbook of Job Facts, SCIENCE RESEARCH ASSOCIATES (SRA)*

How to Become a Successful Manufacturer's Representative, Marvin Leffler, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Industrial Distribution, periodical, McGraw-Hill Company, 330 West 42nd Street, New York, New York.

Industrial Marketing: Cases and Concepts, Raymond E. Corey, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

International Trade Principals and Practices, Paul V. Horn and Henry Gomez, PRENTICE-HALL INC., Englewood Cliffs, New Jersey.

Introduction to Wholesale Distribution, by Dannenberg, Moncrief, and Taylor, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Jobs in Advertising, pamphlet, AMERICAN ADVERTISING FEDERATION, 1225 Connecticut Avenue, N. W., Washington, D. C. 20036.

Marketing, by Charles F. Phillips and Delbert Duncan, RICHARD D. IRWIN, INC., Chicago, Illinois.

Marketing of Agricultural Products by Richard L. Kohls, THE MACMILLAN COMPANY, New York.

Marketing in the American Economy, by Roland S. Vaile, E. T. Grether, and Reavis Cox, THE RONALD PRESS COMPANY, New York, New York.

Marketing Careers in the Jet Air Age, CHRONICLE GUIDANCE PUBLICATIONS, INC.*

Marketing and Distribution, by Ralph E. Mason and Patricia Rath, GREGG DIVISION MCGRAW-HILL BOOK COMPANY, New York, New York.

Marketing Research, by David Luck, Donald Taylor and Hugh Wales, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Marketing Research: Applications, Procedures and Cases, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Marketing Research for the High School Student, CHRONICLE GUIDANCE PUBLICATIONS, INC.*

Marketing Sales Promotion and Advertising, by Carroll A. Nolan and Roman F. Warmke, SOUTHWESTERN PUBLISHING COMPANY, Cincinnati, Ohio.

Managerial Occupations, U.S. Department of Labor, Bureau of Labor Statistics, 1371 Peachtree Street, N. W., Atlanta, Georgia 30309.

Occupational Briefs, CHRONICLE GUIDANCE PUBLICATIONS, INC.*

Occupational Briefs, SCIENCE RESEARCH ASSOCIATES*

Occupational Guidance, booklets, FINNEY COMPANY*

Occupational Guide, series, CALIFORNIA DEPARTMENT OF EMPLOYMENT

Occupational Guide to Public Relations, AN., PUBLIC RELATIONS SOCIETY OF AMERICA, INC., 845 3rd Avenue, New York, New York 10022.

Occupational Manuals, series, GREGG/McGRAW-HILL*

Occupational Outlook Handbook, 1972-73 Edition, Bulletin No. 1700; U. S. Department of Labor, Bureau of Labor Statistics, SUPERINTENDENT OF DOCUMENTS, U. S. GOVERNMENT PRINTING OFFICE, Washington, D.C. 20402.

Occupations and Careers, by Feingold and Swerdloff; WEBSTER/McGRAW-HILL PUBLISHING COMPANY*

Opportunities in Sales Careers, Vocational Guidance Manuals, 235 East 45th Street, New York, New York 10017.

Opportunities With Texaco, booklet TEXACO OIL COMPANY, INC., P. O. Box 52332, Houston, Texas 77052.

Popeye and Careers, Comic Books, KING FEATURES, INC.*

Readings in Marketing, by J. H. Westing, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Salesman, The, pamphlet, Sales and Marketing Executives – International, 630 3rd Avenue, New York, New York 10017.

Sales Occupations, U. S. Department of Labor, Bureau of Labor Statistics, 1371 Peachtree Street, N. W., Atlanta, Georgia 30309.

Selected Cases in Marketing Management, by David E. Faville, PRENTICE-HALL, INC., Englewood Cliffs, New Jersey.

Selecting an Occupation, McKnight and McKnight Company, Bloomington, Illinois

Warehousing, by Melvin S. Hatchett.

Wholesaling, by Kenneth A. Ertel, GREGG DIVISION/McGRAW-HILL BOOK COMPANY, New York.

Wholesaling, Third Edition by Theodore N. Beckman, Nathanael H. Engle and Robert D. Buzzell, RONALD PRESS COMPANY, New York.

Wholesaling, Revised Edition, THE RONALD PRESS COMPANY, New York, New York.

Wholesaling: Challenge and Opportunity, NATIONAL ASSOCIATION OF WHOLESALERS, Washington, D.C.

The Wholesaling and Distribution of Paper, by Floyd H. Blackman, PRENTICE-HALL INC., Englewood Cliffs, New Jersey.

Wholesaling in Distribution, by Harry P. Batis, University of Texas.

Wholesale Drug Sales, periodical, 24 S. 6th Street, Minneapolis Minn.

Wholesale Grocer News, periodical, 431 South Dearborn Street, Chicago, Illinois 60605.

Wholesale Management, by Robert Luter, University of Texas.

The Wholesaler Vital to Our Economy, by Edwin B. Moran, NATIONAL ASSOCIATION OF WHOLESALERS, Washington, D.C.

Wholesale Selling, by Harry P. Batis, University of Texas.

Wholesaling Management, Richard M. Hill, Richard D. Irwin, Inc., Homewood, Illinois.

Working for a Wholesaler, by Grandfield and Gold, Fairchild Publications.

Widening Occupational Roles Work Briefs, SCIENCE RESEARCH ASSOCIATES*

Your Career in the Florida Sun, Florida Industrial Commission, Tallahassee, Florida.

Your Job in Distribution, by Beaumont and Langan; GREGG/McGRAW-HILL PUBLISHING COMPANY*

Your Opportunity in Wholesale Distribution, pamphlet, NAWD

Your Career Selection Guide, Regents Publishing Company, New York, New York

Your Career in Wholesale Distribution, pamphlet, National Association of Wholesale – Distributors, 1725 K. Street, N. W. Washington, D.C. 20006.

Your Wholesalers' Services, by Richard M. Hill, Small Business Administration, United States Government Printing Office, Washington, D.C.

CALIFORNIA DEPARTMENT OF EMPLOYMENT*

Occupational Guides

TITLE OF PUBLICATION

Administrative Services Manager
Credit & Collection Manager
Display Man
Display Man, General Merchandise
Grocery Product Salesman
Management Trainee
Purchasing Agent
Sales Clerk
Salesman, Building Materials
Salesperson
Salesperson, Cosmetics
Salesperson, Home Furnishings
Shipping and Receiving Clerk
Sign Painter
Stock Clerk
Traffic Rate Clerk
Salesperson, Hardware

*CALIFORNIA DEPARTMENT OF EMPLOYMENT
800 Capitol Mall
Sacramento, California 95814

CAREERS PUBLICATIONS, INC.*

Career Briefs

- Advertising Workers
- Buyer
- Cashier
- Credit Manager
- Display Man
- Junior Executives
- Managers, General
- Materials Handler
- Public Relations Man
- Purchasing Agent
- Sales Clerk
- Salesman, Grocery Product
- Salesman, Automobile
- Salesman, Hardware
- Sales (Marketing) Manager
- Sales Promotion Manager
- Stock Clerk
- Vending Machine Routeman
- Wholesale Salesman

*CAREERS PUBLICATIONS, INC.
Largo, Florida 33540

GUIDANCE CENTRE*

TITLE OF THE CAREER PUBLICATION

- *Advertising Copywriter*
- *Manager or Executive*
- *Merchandise Buyer*
- *Purchasing Agent*
- *Salesman*

*GUIDANCE CENTRE
371 Bloor Street
Toronto 5, Ontario

THE INSTITUTE FOR RESEARCH*

TITLE OF PUBLICATION

- *Career Opportunities in Advertising for Men and Women*
- *Careers in Credit Departments — Retail, Banks, Finance, Business*
- *Careers in Food Products Distribution*
- *Merchandising as a Career*
- *Modern Salesmanship as a Career*
- *Careers in Wholesale Merchandising and Distribution*

*THE INSTITUTE FOR RESEARCH
537 S. Dearborn Street
Chicago, Illinois 60605

PROJECT LOOM UNITS*

Careers in Marketing

- Cashier
- Fashion Buyer
- Newspaper Advertising Worker
- Salesperson
- Stock Clerk
- Truck Driver

*PROJECT LOOM UNITS
Learner-Oriented Occupational Materials
The Florida State University
415 N. Monroe Street, Room 223
Tallahassee, Florida 32301

U.S. DEPARTMENT OF LABOR*

Employment Outlook for Advertising, Marketing Research, and Public Relations Workers

Employment Outlook for Automobile Service and Sales Occupations

Employment Outlook for Purchasing Agents And Industrial Traffic Managers

Employment Outlook for Salesmen and Saleswomen in Retailing, Wholesaling, and Manufacturing

Employment Outlook for Salesmen in Wholesale Trade

**U.S. DEPARTMENT OF LABOR
Employment Service Division
Washington, D.C.

GAMES RECOMMENDED*

COMMERCIAL GAMES	*PUBLISHER'S NAME*
Billionaire	Parker Brothers
Boss	Parker Brothers
Careers	Parker Brothers
Dealers' Choice	Parker Brothers
Dig	Parker Brothers
Masterpiece	Parker Brothers
Probe	Parker Brothers
Quibic	Parker Brothers
Concentration	Milton Bradley
Happiness	Milton Bradley
Hollywood Square	Milton Bradley
Jeopardy	Milton Bradley
Password	Milton Bradley
Who, What, Where	Milton Bradley
Lottery	Selchow & Righter
RSVP	Selchow & Righter
Scrabble	Selchow & Righter
Bazaar	3-M Company
High Bill	3-M Company
Venture	3-M Company
Shopping Center	Creative Playthings
Ad Lib	Lowe
Junior Executive	Whitman
Park and Shop	Whitman

*Games listed are highly recommended by classroom teachers who have used them with their Pre-Vocational Distributive Education students in the middle grades 6-9.

NAMES AND ADDRESSES OF SOURCES

A.I.M.S. Instructional Media Services, Inc.
Post Office Box 1010
Hollywood, California 90028

American Advertising Federation
1225 Connecticut Avenue, N.W.
Washington, D.C. 20036

American Association of Advertising Agencies
200 Park Avenue
New York, New York 10017

The American Economic Foundation
51 East 42nd Street
New York, New York 10017

American Express Company
65 Broadway
New York, New York 10006

American Heritage Center
Harding College
Searcy, Arkansas 72143

American Management Association, Inc.
Film Department
135 West 50th Street
New York, New York 10020

American Petroleum Institute
1271 Avenue of the Americas
New York, New York 10020

American Transit Association
815 Connecticut Avenue, N.W.
Washington, D.C. 20006

American Vocational Association
1510 H Street, N.W.
Washington, D.C. 20005

Associated Business Publications
205 East 42nd Street
New York, New York 10003

Association Instructional Materials
600 Madison Avenue
New York, New York 10022

Association-Sterling Films
866 Third Avenue
New York, New York 10022

Bowmar, Inc.
622 Rodier Drive
Glendale, California 91201

The Bureau of National Affairs, Inc.
BNA Films
5615 Fishers Lane
Rockville, Maryland 20852

Business Book Company
159 Emerald Green Court
St. Louis, Missouri 63141

Business Education Films
5113-16th Avenue
Brooklyn, New York 11204

Career World, Inc.
Curriculum Innovations, Inc.
501 Lake Forest Avenue
Highwood, Illinois 60040

Careers Publications, Inc.
Largo, Florida 33540

Carousel Films, Inc.
1501 Broadway Avenue
New York, New York 10036

Chamber of Commerce
Audio-Visual Services Department
1615 H Street, N.W.
Washington, D.C. 20006

Charles Cahill and Associates, Inc.
P. O. Box 1010
Hollywood, California 90028

Chronicle Guidance Publications, Inc.
Moravia, New York 13118

Classroom Film Distributors, Inc.
5620 Hollywood Boulevard
Hollywood, California 90028

Classroom Productions, Inc.
851 College Parkway at McGregor Blvd.
Ft. Myers, Florida 33901

Close Productions
P. O. Box 2858
163 San Carlos Blvd.
Ft. Myers Beach, Florida 33931

Colonial Films, Inc.
752 Spring Street, N.W.
Atlanta, Georgia 30308

Consumer Union Film Library
267 West 25th Street
New York, New York 10001

Coronet Instructional Films
Coronet Building
65 East South Water Street
Chicago, Illinois 60640

Educational Dimensions Corporation
P. O. Box 488
Great Neck, New York 11022

Educational Productions
8328 Willow Way
Raytown, Missouri 64138

Encyclopedia Britannica Films, Inc.
1500 Wilmette Avenue
Wilmette, Illinois 60091

Eye Gate House, Inc.
146-01 Archer Avenue
Jamaica, New York 11435

Fairchild Publicati[illegible]
7 East 12th Street
New York, New York 10003

Film Associates of California
11559 Santa Monica Blvd.
Los Angeles, California 90025

Filmstrip House, Inc.
432 Park Avenue, South
New York, New York 10016

Finney Company
3350 Gorham Avenue
Minneapolis, Minnesota 55426

Fortune Films
Time and Life Building
New York, New York 10020

Guidance Associates
P. O. Box 5
23 Washington Avenue
Pleasantville, New York 10570

Imperial Films, Inc.
332 South Michigan Avenue
Chicago, Illinois 60604

Imperial Productions, Inc.
247 West Court
Kankakee, Illinois 60901

Indiana University
Audio-Visual Center
Bloomington, Indiana 47401

Industrial Management Society
c/o Modern Talking Picture Service
160 East Grand Avenue
Chicago, Illinois 60611

Instructional Systems Associates
P. O. Box 1379
Wichita, Kansas 67201

International Film Bureau
332 South Michigan Avenue
Chicago, Illinois 60604

International Paper Company
220 East 42nd Street
New York, New York 10017

J.C. Penney Company, Inc.
Educational Relations Department
1301 Avenue of the Americas
New York, New York 10019

Joint Council on Economic Education
1212 Avenue of the Americas
New York, New York 10036

McGraw-Hill Book Company
Text-Film Division
327 West 41st Street
New York, New York 10036

Merchandiser Film Productions
419 Park Avenue, South
New York, New York 10016

National Association of Retail Grocers
360 North Michigan Avenue
Chicago, Illinois 60601

National Association of Wholesaler-Distributors
1725 K Street, N.W.
Washington, D.C. 20006

National Consumer Finance Association
701 Solar Building
Washington, D.C. 20036

National Retail Merchants Association
Personnel Division
100 West 31st Street
New York, New York 10001

AE 007 549

Ohio Distributive Education Materials Lab
Ohio State University 1885 Neil Avenue
Columbus, Ohio 43210

Pathescope Films, Inc.
71 Weyman Avenue
New Rochelle, New York 10802

Reynolds Metals Company
P. O. Box 27003
Richmond, Virginia 23216

Roundtable Films, Inc.
321 South Beverly Drive
Beverly Hills, California 90212

Science Research Associates, Inc.
Industrial and Special Education Division
259 East Erie Street
Chicago, Illinois 60611

Sears Roebuck and Company
Public Relations Department
Chicago, Illinois 60611

Society for Visual Education, Inc.
1345 Diversey Parkway
Chicago, Illinois 60614

South-Western Publishing Company
5101 Madison Road
Cincinnati, Ohio 45227
(or contact the regional office serving your area)

Stanton Films
7934 Santa Monica Boulevard
Los Angeles, California 90046

Sterling Movies, Inc.
43 West 61st Street
New York, New York 10023

Storyboard, Inc.
165 East 72nd Street
New York, New York 10021

United States Department of Commerce
Washington, D.C. 20402

United World Free Film Service
5023 N.E. Sandy Boulevard
Portland, Oregon 97213

University of California
Extension Media Center
2223 Fulton Street
Berkeley, California 94720

University of Idaho
Audio-Visual Center
Moscow, Idaho 83843

University of Michigan
Television Center
310 Maynard Street
Ann Arbor, Michigan 48108

University of Minnesota
Audio-Visual Education Service
29 Westbook Hall
Minneapolis, Minnesota 55455

University of Southern California
School of Performing Arts
Film Distribution Center
University Park
Los Angeles, California 90007

University of Texas at Austin
Instructional Materials Services
Division of Extension
Austin, Texas 78712

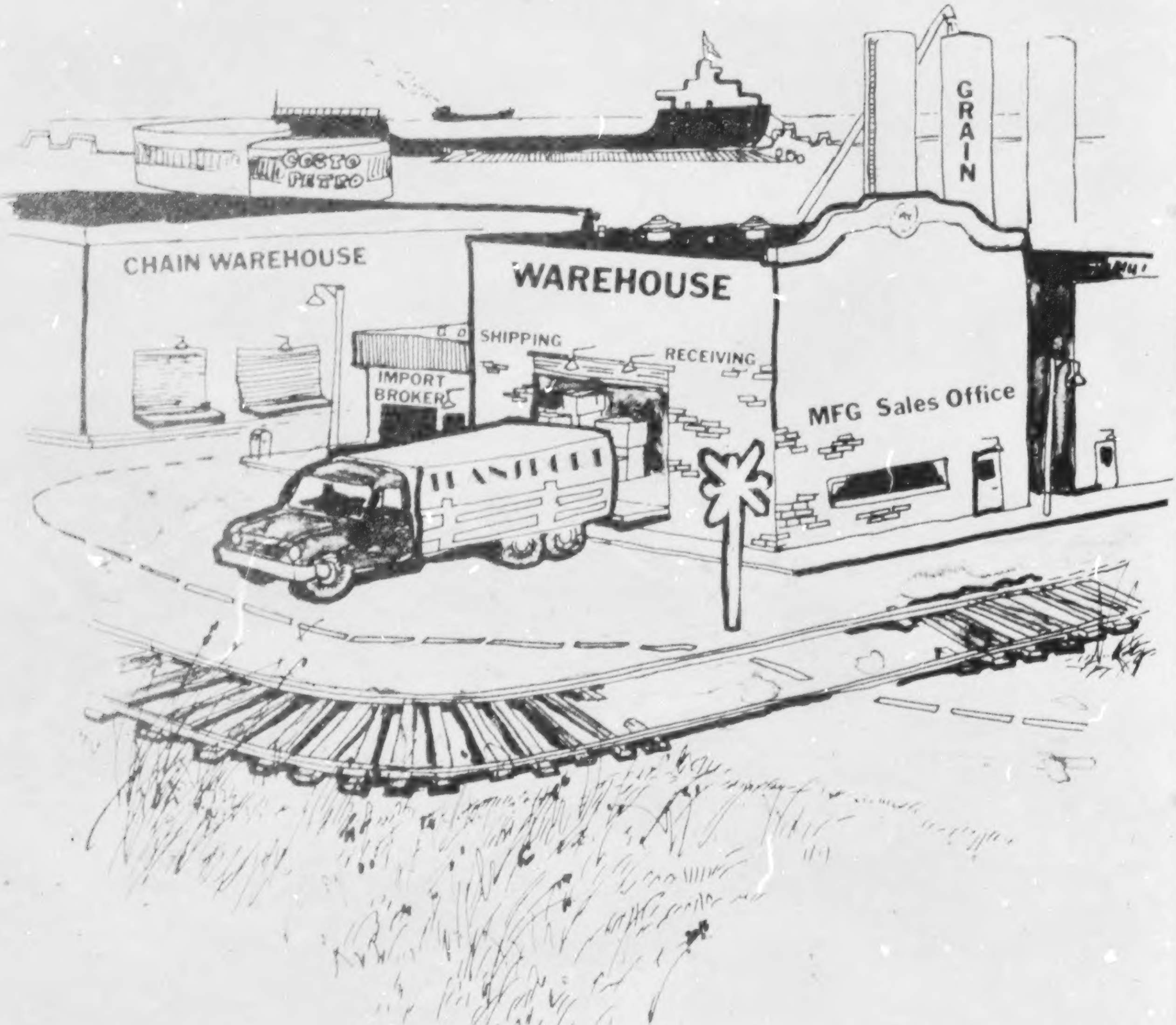
University of Washington
Audio Visual Services
Room 114, Lewis Hall
Seattle, Washington 98107

Visual Education, Inc.
1425 H Street, N.W.
Washington, D.C. 20005

3-M Company
Visual Products Division
2501 Hudson Road
St. Paul, Minnesota 55119

Washington State University
Audio Visual Center
Pullman, Washington 99163

Webster/McGraw-Hill Publishing Company
World Headquarters
330 West 42nd Street
New York, New York 10036



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